



THE COACHING PROJECT
Leaders Coaching Leaders

Becoming a Leader Coach

Workbook & Program Guide

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Table of Contents

CHAPTER 1 - Welcome to Becoming a Leader Coach®.....5

About The Coaching Project 5

Access to the Becoming a Leader Coach Website .. **Error! Bookmark not defined.**

Leadership-Coach Website (www.tcpleadercoach.com) **Error! Bookmark not defined.**

What's So? 6

Our Objectives 6

Your Goals and Development Plan..... 6

Beginning Where You Are 7

How to Use This Workbook 9

So What? 13

The Leader Coach Framework 13

1. Leader Coach Overview 14

2. Your Learning Journey..... 16

3. Leader Coach Principles 17

4. Using a Both/And View 19

5. The Leader Coach Process 20

The Holographic Nature of the Framework 21

6. The 12 Steps in the Leader Coach Process 25

7. A Demonstration 30

What's Next? 34

Applications 34

Self-Evaluation..... 34

Updating Your Development Plan 34

CHAPTER 2 - Building Trust35

What's So? 35

Our Objectives 35

Your Goals and Development Plan..... 35

So What? 36

The Leader Coach Framework 36

The 4 Steps in Building Trust 36

A Demonstration of Building Trust.....	37
8. Trust Exercises	38
9. Practice in Building Trust	41
Self-Discovery	42
Applying Your Insights.....	42
Tools, Tips, Techniques	44
10. Unconditional Positive Regard (UPR)	44
What's Next?	46
Going Further in Building Trust.....	46
CHAPTER 3 – Building Awareness	47
What's so?	47
Our objectives.....	47
Your Goals and Development Plan.....	47
So What?	48
The Leader Coach Framework	49
The 5 Steps in Building Awareness.....	49
About Building Awareness.....	50
A Demonstration of Building Awareness.....	53
Practice in Building Awareness	56
Dealing with Resistance.....	59
A Demonstration of Dealing with Resistance.....	62
The Importance of Dialogue and Coaching Language.....	71
Communication Filters.....	75
What's Next?	80
Applications and Getting Feedback.....	80
Self-Evaluation on Building Awareness	80
Updating Your Development Plan	84
CHAPTER 4 – Building The Future	85
What's so?	85
Our objectives.....	85
Your Goals and Development Plan.....	85
So What?	86
The Leader Coach Framework	86
The 3 Steps in Building The Future.....	87
Choosing the Best Coaching Strategy	88
About Building the Future	93

A Demonstration of Building The Future.....	96
Practice in Building the Future.....	99
More Cases to Develop Your Skill.....	103
Performance Improvement Cases:	103
Developmental Cases:	105
Performance Improvement Cases:	107
Developmental Cases:	108
Tools, Tips, Techniques	111
Sample Powerful Questions for Building Awareness	111
Work/Life Balance.....	113
SMART Goals (Specific; Measurable; Attainable; Realistic; Timely)	114
Accountability and Commitment (The Monkey)	117
Resources for Development Planning	118
What's Next?	119
Applications and Getting Feedback.....	119
Self-Evaluation on The Coaching Model.....	119
Feedback from your coachees	120
Celebrating and Recycling.....	122
Appendix 1 – Case Studies.....	124
Case #1 - Building Awareness.....	124
Case #2 - Dealing with Resistance.....	125
Case #3 - Building the Future	126
Appendix 2 – Development Plan Template.....	128
Appendix 3 – Coaching Competency Questionnaire	131
Appendix 4 – Leader Coach Competency Survey	134
Appendix 5 – Coaching Log.....	138

CHAPTER 1

Welcome to Becoming a Leader Coach¹

We are delighted to have you with us on this journey to becoming a Leader Coach.

This workbook is your guide to the site, to the video modules, and to your own learning. We have provided lots of ways to engage with the material depending on your level of interest and experience. What we imagine is that you will use this workbook as your map of the territory of the Leader Coach with the videos as stopping points along the way to allow you get a better and fuller picture.

The videos are conversations, demonstrations and practice sessions in much the same way we use them in our workshops. They contain the majority of the concepts and practices of becoming a Leader Coach. The workbook provides the program structure, lots of support material, and questions and exercises to help you apply the learning to your own experience.

If you would like a more rigorous treatment of the Leader Coach ideas, you can order *Leadership Alchemy: The Magic of the Leader Coach* from our website at www.thecoachingproject.com.

About The Coaching Project

Let us introduce ourselves. Susan Wright is President of The Coaching Project, an executive coaching and coach education firm. Carol MacKinnon is Senior Associate at TCP and co-leader of our Leader Coach workshops. Together, Susan and Carol describe and demonstrate through the video modules the Leader Coach concepts and practice.

David Gibson is also an Associate of TCP and the videographer and producer of the video modules. Pat Pinto is a colleague who plays the role of coachee in a number of the practice modules.

So, welcome and we hope you enjoy becoming a Leader Coach!

¹ The term 'Leader Coach' is a trademark of The Coaching Project Inc. We have not repeated the trademark symbol ® in the text for clarity. However, please do not use the term without permission.

What's So?

Our Objectives

We have created this e-learning experience because there are now thousands of people who have experienced the Leader Coach approach and we want to stay in touch with all of you, and support your ongoing learning journey.

We also want to continue to grow the numbers of people who are learning about becoming a Leader Coach who have never before encountered the material.

Our hopeful outcome is that you will find this site useful if:

- you are a complete beginner experiencing Leader Coaching for the first time.
- you want to refresh your learning after some time away from what you originally learned.
- you want to revisit a certain aspect of Leader Coaching that has come up in your circumstances to see how you might approach the issue
- you are an experienced Leader Coach looking to deepen your practice and explore some advanced nuances.

Your Goals and Development Plan

Development research tells us that the clearer you are about your learning goal, the greater your chances of reaching it – makes sense, right?

So we invite you here, before you dive in, to think about the list above in terms of where you fit and then to write a preliminary learning goal below. This may change as your learning proceeds and that's OK. What you want is simply to set your intention up front so your learning has some focus.

Write your learning goal in the space below:

My preliminary learning goal is to:

We have included a Development Plan Template as Appendix 2 at the back of this workbook. We believe this template includes all of the components required to create an effective plan. We will refer you to this template throughout the workbook as you move through becoming a Leader Coach. It will allow you to track your learning and achievements as well as to expand your plan as you find areas you would like to further develop.

Beginning Where You Are

Based on your self-assessment above, we've organized the material to make it easy for you to start at the level that's best for you.

If this is the **FIRST TIME** you've encountered this material, we invite you to step through the workbook and the videos in the order they are presented here.

We do understand there are different learning styles and you may want to just roam around first, to get a feel for what's here. If that's the case, we encourage you to return at some point to the beginning so that you can build a solid foundation of concepts and competencies for your practice.

Here is what a guided step-by-step learning journey through the site might look like:

- we will give you an overview of what we mean by Leader Coach and the principles that underlie the approach
- we will review the three stages in the Leader Coach model and walk you through each of the twelve steps in the process
- we will show you how this process looks by giving you a number of demonstrations

- you will see examples of how a Leader Coach might work with a direct report or colleague to gain commitment to an action plan
- you will have opportunities to sit in on cases taken from workplace situations where we apply the Leader Coach model and debrief what worked and what didn't
- we will provide you with tips and techniques to use in each of the three stages
- we will give you assessment tools so that you can track your progress

If you're **RETURNING** to the Leader Coach material, perhaps having completed the training and keen to refresh your skills or learn more about certain aspects of the process, we invite you to return to those modules that appeal to you.

It may be helpful to:

- revisit the three Leader Coach process stages and the twelve steps to be sure you've got them covered
- review the underlying principles and philosophy of Leader Coaching to see if there is anything you now understand differently
- test yourself with one of the practice cases where you can explore your own understanding and skill development
- find a particular module that deals with an issue you're experiencing right now that you need some perspective on
- look at some of the tools, tips and techniques that you may have forgotten so you can build them into your Leader Coach practice

If you feel you have a good level of Leader Coach skill already, you might now be interested in **DEEPENING** your competency.

This might include:

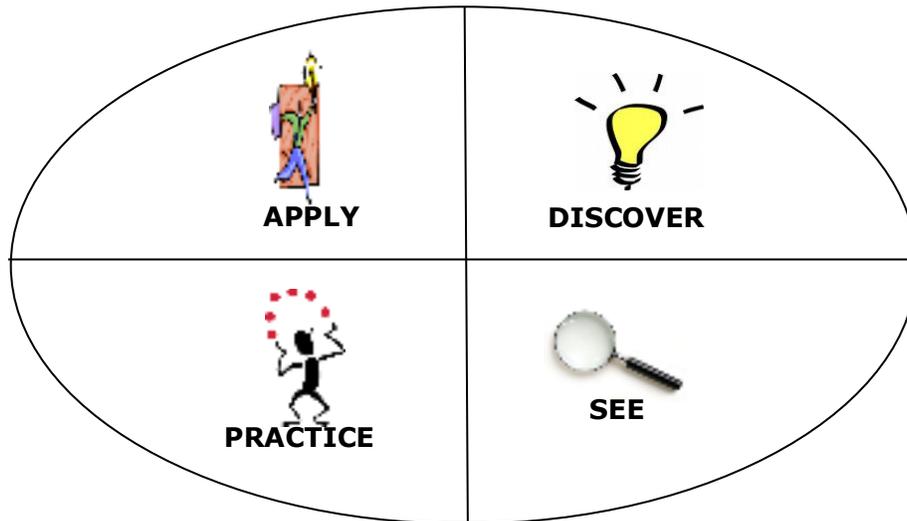
- rereading *Leadership Alchemy* to identify areas where you would like to deepen your learning
- updating your Development Plan (Appendix 2) to reflect your success and add what you now experience as your Leader Coach challenges
- redoing the Leader Coach Competency questionnaire (Appendix 3) to pinpoint where your learning edges might be, or reviewing your most recent 360° survey feedback to see where you might either leverage your strengths or address any issues

- on the basis of this review, using the site to return to the material with 'new eyes' to see what you missed the first time around that you can add to your skill set
- using the demonstrations and cases as ways to evaluate the Leader Coaching and compare it to your own – what are your particular skills in relation to the coaches you see, and what might you learn from competencies you see demonstrated effectively in these examples?
- particularly focusing on the tools, tips and techniques that can broaden and enhance your Leader Coaching.
- considering setting up a community of Leader Coach learners who share their best practices and lessons learned with you and others, so that you can both deepen your own competency and contribute to the ongoing development of these ideas and concepts as they support the development of high performance cultures.

How to Use This Workbook

There are many different ways to learn something new, or to improve our level of skill in some area we would like to develop. Many people learn best by seeing the big picture and then drilling down into the parts of the picture they would like to know more about. Others learn by watching someone else and then trying it out for themselves.

For this reason, we've provided a number of ways for you to engage with the learning modules in the Leader Coach program. There are four main entry points as shown in the following diagram, leading you through the learning modules in a chronological order. And, as we've said, it may suit you better to just dive in where your intuition takes you.



Discover DISCOVER

Where you see Discover, you will find the big picture overview of a section of the site. Some of the Discovery modules are:

- The Leader Coach Overview
- The Principles
- Introduction to the Leader Coach Model and a Demonstration
- The 12 Steps in the Leader Coach Process
- Introduction to Building Trust
- Introduction to Building Awareness
- Introduction to Building the Future

These introductory modules will give you an overview of our Leader Coach process and each of the three stages of Building Trust, Building Awareness, Building the Future.

If you're not familiar with our Leader Coach process, you may find it helpful to begin with these modules to give yourself an orientation to the approach and the steps involved. If you're more interested in a refresher or a particular stage in the process, you can simply begin there.

**SEE****See**

There are a number of sections in the material called See. In these sections, you will find a demonstration of the specific stage or steps of the Leader Coach process. Carol and Susan coach each other to model how the process looks. These are not cases – rather they are real life situations that are being experienced and coached in the moment. So they are not rehearsed or intended to be polished examples. Rather, they are real coaching conversations for you to look in on.

As you watch these modules, you can be an observer, assessing the coaching taking place – what you see, what you like, what you'd like more of, less of, etc. Following the demonstration, Susan and Carol often debrief the coaching, giving each other feedback about how it went. Leader Coaching is an art, so it is never perfect – we demonstrate in these modules how you can always learn from your experience.

**PRACTICE****Practice**

With each of the three stages of Building Trust, Building Awareness, Building the Future, you will find a section called Practice. In these sections, you will find a practice session involving a coach and coachee and sometimes an observer as well. We often use a case example which is included in the workbook of a common situation where coaching would be appropriate.

During these practice sessions, you will have the opportunity to be the observer, a key role when learning to be a Leader Coach. The role of the observer is to pay attention to the coaching, noting what is working well and not so well, how the steps are being followed, what the body language is like, what powerful questions really worked, and so on. The observer often takes notes, and we provide some space for you to do the same thing, as you are watching.

Following the practice sessions, we will do a debrief, so you will have an opportunity to compare your assessment of what worked and what might have been done differently with how the coach and coachee in the situation felt. Being the observer in these practice sessions provides you with opportunity to take note of things that would work for you.

**APPLY****Apply**

Here is the heart of the learning – you cannot learn to be a coach by reading about it, watching it, thinking about it, writing about it – you have to DO it!

We do recommend that if you are unfamiliar with the Leader Coach process, you begin by understanding the structure, the discipline, the series of steps to follow, and you internalize that structure before taking it 'on the road'. However, as soon as you're comfortable, and in small steps if necessary, you need to get out and try it on.

In the sections called Apply, we provide you with some tools, tips and techniques for applying what you've learned to your own situation. We give you resources to deepen your understanding, tips for how to avoid the inevitable pitfalls, and tools we've come across that have worked for us.

We also provide some worksheets that will help you to record your Leader Coach experiences so you can see how you learn and grow over time. We recommend that you always keep notes of your conversations – the date, the key issues, your reflections.

There are also additional sections that provide More in each stage, where we take some of the critical issues and explore them in more depth. In each of the stages of the Leader Coach process, there are some challenges for the coach. We address those challenges in these sections as well as emphasizing key success factors we've discovered.

At the end of each of the Leader Coach stages, we have provided a self-assessment so you can judge your skill level and coaching capacity. The test reviews the key elements in each of the stages. If you've missed a few, it's easy to go back and pick them up through

review. You can also use the assessment as a tool for checking with your coachees about how you're doing – feel free to use some of the questions in the assessment in a brief email survey to your coachees to get their feedback on your Leader Coach capability.



Some of the material is presented in Video format. The "video" icon shown above indicates that a video is available on the website for this material.

So What?

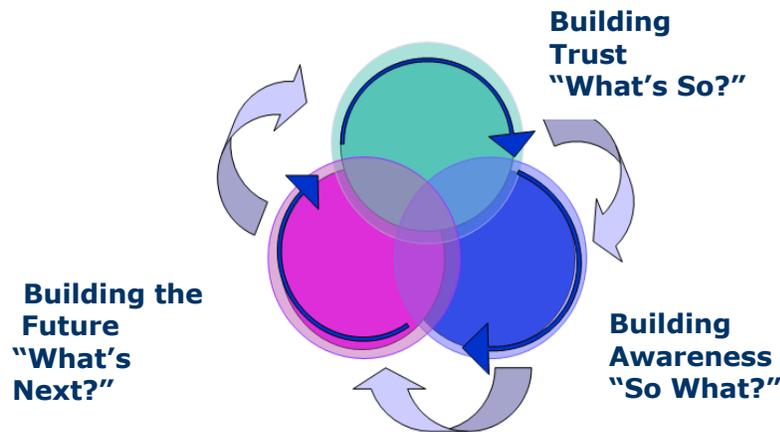
The Leader Coach Framework

The framework we use throughout *Becoming a Leader Coach* is shown below. This framework, or model, anchors the entire e-learning journey. It consists of three stages, each of which has a focus and a question. You will see these stages and questions throughout the site and the workbook. A brief introduction is provided here much more detail and nuance unfolds as you progress.

The first stage in Leader Coaching is Building Trust. This is the beginning of the Leader Coach process and a critical dimension for success in what follows. The question is "What's So?" What is the current situation, the story.

The second stage in Leader Coaching is Building Awareness. This is the heart of the Leader Coach process where one digs into the issues and challenges. The question is "So What?" What is the problem to be addressed or reframed.

The third stage in Leader Coaching is Building the Future. This is the culmination of the Leader Coach process and where change based on new perspectives takes place. The question is "What's Next?" What will be different, what action will be taken, as a result of new learning or information.



This framework can be used in a number of ways to enhance leadership effectiveness:

- **As a coaching process.** For example, the stages will be used throughout the site and you will practice how to coach using the framework and questions.
- **As a communications process.** The three simple questions are a useful way of framing a conversation to discover how another person is feeling, or to reflect on one's own opinions.
- **As a problem-solving tool.** For example, the three questions are similar to the stages in strategic planning – what is the current story, what needs to happen differently to create a new story, and what do we need to do to get there.
- **As an organizing mechanism.** For example, we have used the three questions as a way to organize the information in the workbook. The sections titled "What's So?" will outline goals and objectives so we're clear about what we are discussing. The sections titled "So What?" will dig into the heart of the material with concepts, demonstrations, and tools, tips, etc. The sections titled "What's Next?" will provide support to your own action in applying the ideas to your context and focusing on what further development might be appropriate.

We encourage you to become familiar with this framework or model and its stages and questions. Once you have 'embodied' it, you will find it becomes an effective way of framing your thinking and communicating.

1. Leader Coach Overview

Let's dig in! In this module, Carol gives a brief overview of Leader Coaching. As you watch this introduction, think about what is familiar

territory to you and what is new information. What questions you have that you will want answered as you move forward?



Please watch Video 1 – Leader Coach Overview

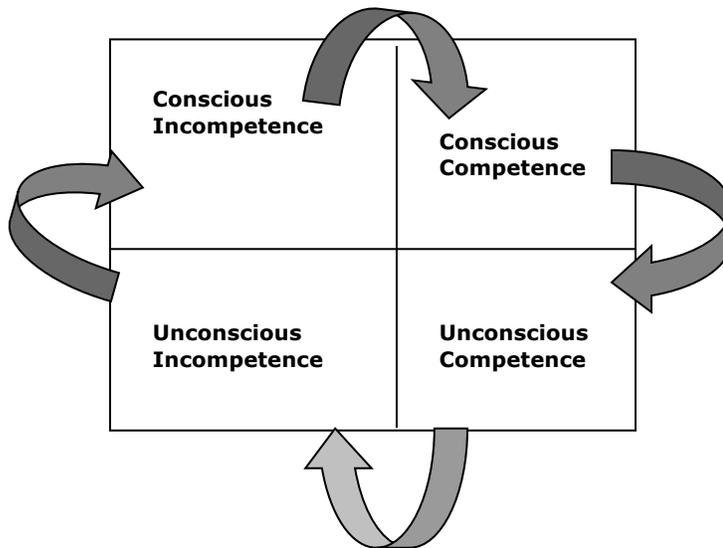


Record you questions below so you have a record of them that you can return to from time to time.

My current questions are:

2. Your Learning Journey

In this module, you have another opportunity to reflect on where you are in the learning journey to becoming a Leader Coach. This four-box model is an adaptation of the work of Chris Argyris² on the steps we go through in learning something new.



Refer to the diagram above as you watch the video. What stage are you at as a Leader Coach? What do you hope to achieve through this e-learning journey? Can you think of examples from your own life of moving through these stages? Make any notes below.



VIDEO

Please watch Video 2 – Your Learning Journey



DISCOVER

² Chris Argyris & Don Schon, *Organizational Learning: A Theory of Action Perspective*. Addison-Wesley, 1978.

Self-assessment and examples of my learning journeys:**3. Leader Coach Principles**

In this module, we outline and discuss the principles behind being a Leader Coach. The headlines are reproduced below:

- A goal-directed learning process
- A part of everyday interactions – a way to be
- Increasing self-awareness that leads to change
- Encouraging every person to contribute their best
- As much about the leader as the person being led
- A way of growing a high performance culture – based on trust & engagement

**VIDEO****Please watch Video 3 – Leader Coach Principles****DISCOVER**

Coaching is applied leadership. It is the way leaders in change work with others to achieve the organization's goals. It is interesting to note that this style of leadership has become paramount as the pace of change has increased. One of the key differences is that it requires more self-awareness in the leader – leaders in change must operate from 'the inside out', from their own character and integrity. If they don't, those around them don't trust them and won't follow or give their best.

What strikes you about these principles? Are there some that are how you lead now? Note those below. Which ones do you need to

work on? How might you need to change to embody these principles in the way you lead?

I embody these Leader Coach principles now:

I would like to develop these Leader Coach principles:

Here is a book resource if you are interested in more information on these principles:

Thomas Crane, *The Heart of Coaching: Using transformational coaching to create a high-performance coaching culture*. P. 23. Available on Amazon.

4. Using a Both/And View

Here we highlight one of the foundational principles of being a Leader Coach – having a ‘both/and’ perspective. In many ways, we live in an ‘either/or’ world where we are asked to choose between things, to get the ‘right’ answer in school, to meet the budget at any cost at work, for example. However, in our complex and constantly changing situations, this ‘either/or’ thinking breaks down. We must move to ‘both/and’ ways of thinking, including broader perspectives and managing polarities.

Being a Leader Coach is an example of ‘both/and’ – it is BOTH leading AND coaching at the same time. Here are some examples of the kind of ‘both/and’ challenges facing the Leader Coach that are included in the video:

- BOTH leading AND coaching
- BOTH results AND process
- BOTH accountability AND support
- BOTH performance AND development

You will notice that we use 4-box models frequently in our discussions. The reason is that a 4-box model frames an issue or question as ‘both/and’ rather than ‘either/or’. Referring back to the example we used in the Learning Journey module, reproduced below, you can see that we are discussing whether one is conscious or unconscious, competent or incompetent. These are ‘either/or’ trade-offs. When put together, however, they become four inter-related perspectives that expand our options.

Conscious Incompetence	Conscious Competence
Unconscious Incompetence	Unconscious Competence



Please watch Video 4 – BOTH/AND View



DISCOVER

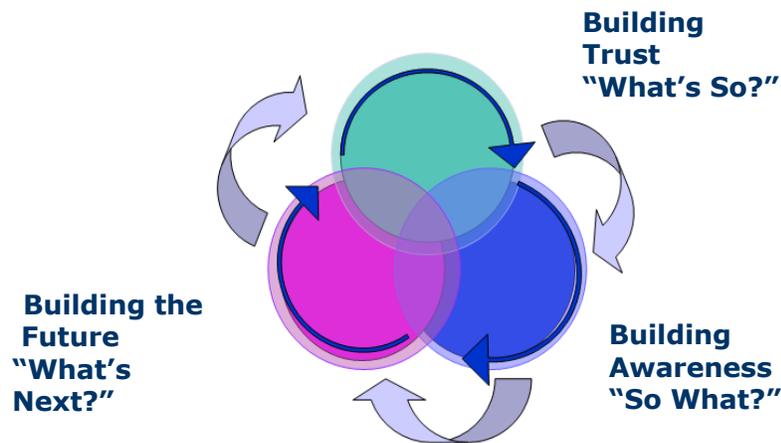
Can you think of other examples of this 'both/and' kind of thinking? Set an intention for yourself that the next time you find yourself making an either/or trade-off, you'll reframe your thinking to include 'both/and' in your perspective. Make some notes below.

Examples and a Both/And Intention:

5. The Leader Coach Process

In this module, we introduce the Leader Coach framework, also called a model or process, it is all the same thing. This is the diagram we introduced briefly at the beginning of this section of the workbook. Here we will walk through the three stages and discuss each of them. Then, Susan will coach Carol to give an example of how it looks. This coaching conversation is about "Saying No" and may be a circumstance you're familiar with.

We've provided lots of space for taking notes as you watch, paying attention to see if you can identify the steps in the conversation as they unfold.



You will see the framework referred to during the video and you may want to have it in front of you as well.

	<p>VIDEO Please watch Video 5 – Leader Coach Process</p>	
		<p>DISCOVER</p>

The Holographic Nature of the Framework

We refer to this framework as “holographic”. What we mean by that is that each of the stages occurs in each of the stages. That’s a bit confusing so let’s explain. A hologram is a type of photographic plate where, when you break it apart, the whole picture is still contained in each of the pieces, no matter how small. The same is true for our Leader Coach process. Each of the three stages happens in Building Trust, Building Awareness, and Building the Future. The time spent on each will, of course, vary but each stage is repeated as you move through the conversation.

For example, when Building Trust, we always begin by connecting with the person being coached to build some trust. We then ask about their story or challenge, what they would like to discuss. In doing this, we are building some awareness in the person about their own issue, helping them to be clearer about it than they have perhaps been before. And as we complete this stage, we frame the coaching issue or contract so both parties are in agreement on the

coaching topic, in a sense building a future which will be further explored as we move to the next stage of Building Awareness.

The Building Trust stage can take anywhere from a few minutes with someone you know and interact with frequently to a few hours or meetings if this is a complex issue or there are interpersonal dynamics involved. We often say that the timing is “elastic” and you will note this reference in the video.

You may want to watch the module and the demonstration once through before completing the exercise below, so you have a sense of the whole conversation.

The steps in each stage are listed below. As you watch, try to identify what the coach is saying that pertains to each step. What do you notice? What questions are asked? What kind of language is used? For example, what question does Susan ask Carol as they begin to build the appreciative connection? What do you notice about her body language? What kind of mood does she create? Be the observer in this dialogue and make some notes on what you see.

Building Trust:

Making the appreciative connection

Understanding the story

Using active listening and clarifying questions

Building Awareness:

Using dialogue to explore and gain insight

Challenging resistance

Reframing the issue

Building the Future:

Seeking commitment to action

Providing support

Restate to wrap up

Being able to observe and give feedback is one of the hallmarks of a great Leader Coach. What observations do you have that you might give Susan on her coaching of Carol? Did she cover each of the

stages and steps? Was her body language engaging? Did she listen and rephrase what was said? Did she ask questions rather than providing advice?

A Feedback Structure

Here is a feedback structure we have found effective in providing both positive and constructive feedback to someone who has been coaching. Be sure you use this structure when giving feedback to others on their performance.

- Start your sentences with “I”. You are providing a perspective from your own point of view and need to ‘own’ it. The person receiving the feedback can decide whether to agree with it, accept it or act on it.
- Begin your feedback with what you liked that you saw. Talk about what worked for you, what you felt was effective.
- Then add what you thought worked less well for you, what you felt was less effective, or what you might like to see more of or less of. Be sure to include this aspect of the feedback – we get very little constructive feedback on our performance. It is essential for development and improvement.

Based on this feedback structure, what would you say to Susan about her coaching of Carol in the “Saying No” conversation.

What I liked, what worked for me, what was effective, what I would like to see more of:

What I thought worked less well, what was less effective, what I would like to see less of:

6. The 12 Steps in the Leader Coach Process

Now that you have had a chance to view a Leader Coach conversation, it is time to explore in more depth each of the steps in the process. In this module, we dive into the steps in more detail to discuss the challenges and opportunities in each.

You will notice that we use the term “coachee” to refer to the person being coached. This is a general term – the person might be a direct report, a peer, even your boss if you are a leader in your work environment. If you are in a functional role, the coachee might be a line manager or other client in the organization who you are supporting. It might also be someone in your community, a friend or colleague, even your teenager!

This is the longest module in the e-learning journey so you may want to view it in parts. We have given the timing for the start of each stage so you can do one at a time. We have also suggested reviewing each of the stages and corresponding steps as you begin that chapter of the workbook.

The module begins with a brief review of the Leader Coach framework, as we’ve discussed it previously.

[Building Trust](#) (starting at 21:50 in the video)

Here are the steps in Building Trust. You will see them at the bottom of your screen as they are introduced.

1. Create the appreciative connection
2. Understand the goal/issue/story
3. Use active listening, empathy, clarifying questions
4. Reflect on themes, causes



As you watch this section, what insights or reflections do you have and what questions arise for you? Jot some notes before you move on to the next stage.

My insights and questions on Building Trust:

Building Awareness (starting at 15:53 in the video)

Here are the steps in Building Awareness. You will see them at the bottom of your screen as they are introduced.

5. Agree on the coachable gap
6. Offer feedback as a learning tool
7. Use dialogue to search, explore, gain insight, understand resistance
8. Challenge "discontinuities" – what doesn't make sense?
9. Reframe the issue to create new direction

The Coachable Gap

Notice that the first step in Building Awareness is to agree on the coachable gap. This is often called “contracting”. It is the step where you as the coach pause to review what your understanding of the ‘contract’ is, and should include the following elements:

- The coaching issue or question
- The duration of the coaching
- The fees for the coaching, if any
- Arrangements for meetings and whether they will be face-to-face or on the telephone or both
- The duration of each session
- What tools might be used to assess the current situation
- Who might be interviewed for additional information
- How the boss and/or HR will be involved
- Confidentiality issues – who will be privy to any information generated
- Cancellation policies – what happens if the coaching doesn’t ‘take’ or if meetings are missed
- Whether there is any report at the end of the coaching.

Offering feedback

In the previous section where we introduced the Leader Coach process and provided an example, we introduced a structure for giving feedback. You may want to refer to it now, to refresh your memory.

Often in the Leader Coach process, there is a need to collect more information from different sources rather than to simply rely on the person’s own reflections. We know from research that we are the worst evaluators of our own behaviour so it’s important to seek feedback from those around us to see how we are perceived by others. This can be done through interviews and surveys which are widely available.

In the video, we mention 360° feedback. This is usually a multi-rater survey where you, your boss, and a number of your peers, direct reports or perhaps customers complete a series of questions about how they perceive your leadership competencies. The report is confidential and gives you a number of ways to analyze how you are seen by the different groups on a variety of leadership skills.

Use dialogue to understand resistance

Here you may want to refer to the section on Dealing with Resistance in the chapter on Building Awareness. Resistance is a key part of coaching. After all, if we didn't feel any resistance to the change that needs to be made, we'd just go ahead and make it, with no need for a coach! Resistance is a gift from the person being coached that provides you with clues about what is prohibiting them from moving forward.

As you watch this section, what additional insights or reflections do you have and what questions arise for you? Jot some notes before you move on to the final stage.

My insights and questions on Building Awareness:

Building the Future (starting at 6:14 in the video)

Here are the steps in Building the Future. Again, they are shown at the bottom of your screen as they are introduced.

10. Develop alternative goals/futures
11. Seek commitment to accountable action plans
12. Encourage, support, evaluate, celebrate, begin again

Developing Alternative Futures

There are many useful tools you can use as a coach to help the person you are coaching to generate alternative visions for their future. This step in the Leader Coach process is imaginative, creative and fun. You can use brainstorming, visioning, meditation, scenario development, or any number of planning processes. The important point is that you choose a method that suits the situation and that you're comfortable with. You can assist with generating ideas.

However, our rule of thumb is that you always suggest more than one and be sure the person you're coaching has the final say.

Seeking Commitment to Action

You will notice in the video that we mention SMART goals.

SMART goals are:

- Specific
- Measurable
- Action-oriented
- Relevant
- Time-based.

This is the step in the Leader Coach process where you may need to choose different strategies, depending on the extent to which the person is actually committed to and acting in accordance with their plans. If all is going well, you simply need to support the direction and provide whatever additional resources may be required. If you see that commitment is waning, you may want to add some challenge, or revisit the vision to fuel motivation to continue with whatever changes are to take place.

It is quite usual that after the first blush of enthusiasm, the person may 'run out of steam' and need you to provide sufficient challenge and support to get back on track. In the case where the person is obviously not committed to taking action, you will need to clearly define the consequences and follow through on them. Coaching is not just a conversation, or listening with empathy – something different needs to happen as a result of the process. The Leader Coach cannot enable inaction!

We will return to these strategies and how to coach through them in the Chapter on Building the Future.

Evaluate, Celebrate, Recycle

In the video, Susan mentions the team and organizational levels. This workbook is dedicated to the individual level. Future versions of the *Becoming a Leader Coach* series will be devoted to the team and organizational levels.

As you watch this final section, what additional insights or reflections do you have and what questions arise for you? Jot some notes before you complete this module.

My insights and questions on Building the Future:

7. A Demonstration

In this module, we provide another demonstration of the Leader Coach process. This time, the coach is Carol and the topic is “Making a Presentation”. Again, we provide the steps in the process and ask that you play the role of the observer, taking notes of what you see and providing feedback to the coach on both what you would like more of, what worked for you, and also what you would like less of, what didn’t work so well for you.



Please watch Video 7 – Coaching Demonstration



SEE

Building Trust:

Making the appreciative connection

Understanding the story

Using active listening, empathy and clarifying questions

Building Awareness:

Offering feedback as a learning tool

Using dialogue to explore and gain insight

Challenging "discontinuities" – what doesn't make sense?

Reframing the issue to set a new direction

Building the Future:

Developing alternative goals/futures

Seeking commitment to accountable action plans

*Encouraging, supporting, evaluating, celebrating,
beginning again*

Here again, we want to reinforce that being able to observe and give feedback is one of the hallmarks of a great Leader Coach. What observations do you have that you might give Carol on her coaching of Susan? Did she cover each of the stages and steps? Was her body language engaging? Did she listen and rephrase what was said? Did she ask questions rather than providing advice?

Using the Feedback Structure

Remember the feedback structure we introduced in the previous module. Be sure you use this structure when giving feedback to others on their performance.

- Start your sentences with “I”. You are providing a perspective from your own point of view and need to ‘own’ it. The person receiving the feedback can decide whether to agree with it, accept it or act on it.
- Begin your feedback with what you liked that you saw. Talk about what worked for you, what you felt was effective, what you might like to see more of.
- Then add what you thought worked less well for you, what you felt was less effective, or what you might like to see less of. Be sure to include this aspect of the feedback – we get very little constructive feedback on our performance. It is very valuable for development and improvement.

Based on this feedback structure, what would you say to Carol about her coaching of Susan in the "Making a Presentation" conversation.

What I liked, what worked for me, what was effective, what I would like to see more of:

What I thought worked less well, what was less effective, what I would like to see less of:

What's Next?

Applications

Now that you have been through the process, it is time to take some action. This is not the point at which you necessarily want to make significant changes; rather, it is just an opportunity to reflect on your insights so far and to take the first small step. How might you begin to apply what you have learned to this point?

Self-Evaluation

You now have a sense of who a Leader Coach is and what a Leader Coach does. You may want to take this opportunity to go back to your original goal to see if it's still relevant for you or what changes you might make. Can you be more specific now? Are you beginning to see some of your possible strengths and development gaps?

We have included as Appendix 4 a brief survey of Leader Coach skills and we encourage you to complete the survey now. It covers the personal effectiveness competencies we feel are required to be a successful Leader Coach. It will help you to focus your learning plan on those competencies you feel will make the greatest difference to your leadership performance. You will want to come back to this survey a number of times as you work through the e-learning journey to track your improvement.

Updating Your Development Plan

The final step before you move into the chapter on Building Trust is to update your development plan. Refer to the Development Plan template in Appendix 2 and add your survey results in the form of development goals, your current situation, the gap, and specific steps you will take. This is still a draft plan but keeping it current as you proceed will allow you to be intentional about your behaviour even as you are becoming a Leader Coach.

CHAPTER 2 - Building Trust

What's So?

Building Trust is the first stage in the Leader Coach process and a critical phase because it lays the foundation for everything that is to come in the relationship between the Leader Coach and the person being coached.

Whether you're coming to this material for the first time or just refreshing your skills, we invite you to explore how you build trust in your communication and action, and how you might improve.

Our Objectives

We hope that by working through the steps in Building Trust, seeing them demonstrated, practicing them yourself with a case study, and then deciding how to apply them in your own Leader Coaching, you will have a clear sense of how to build trust with others in any communication. Trust is a foundational value in any leadership role – it is a 'price of admission' into the leadership realm.

Many coaching processes ignore this critical first step. We encourage you to develop trust building skills – we believe it's the difference that makes all the difference in the results you will achieve.

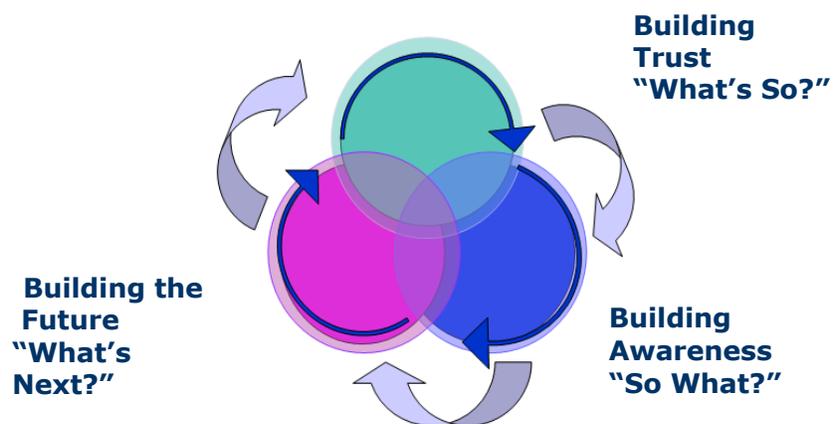
Your Goals and Development Plan

This is your opportunity to state your intention for this chapter of your learning journey. Review your development goals and plans to see where Building Trust fits. What do you need to learn or practice in order to be effective at Building Trust?

You may want to ask some colleagues or your boss or members of your family how they feel about your ability to Build Trust. Get some feedback to add to your self-assessment so you're sure you're evaluating yourself fairly.

My development goal for Building Trust is:***So What?*****The Leader Coach Framework**

As you begin, you will want to have the Leader Coach framework in mind. Although we are focusing on Building Trust, you may remember that this is a holographic framework – each of the stages occurs in each of the stages. So you will be Building Trust, Building Awareness, and Building the Future in this stage through the steps in the process. We will explain how this works in more detail as we move through the steps.

**The 4 Steps in Building Trust**

Here, again, are the four steps in Building Trust that we introduced in the previous chapter. You may want to go back to

Module 6 (The 12 Steps in the Leader Coach Process) to review these steps so that you're familiar with them as we move into demonstration and practice sessions.

1. Create the appreciative connection
2. Understand the goal/issue/story
3. Use active listening, empathy, clarifying questions
4. Reflect on themes, causes

A Demonstration of Building Trust

If you have started at the beginning of the workbook, you have already seen two examples of Building Trust in conversations between Carol and Susan. You may want to review Module 5 (The Leader Coach Process with an Example) where Susan coaches Carol on "Saying No" or return to Module 7 (A Demonstration) where Carol coaches Susan on "Making a Presentation".

If you're jumping in at this point, it's probably a good idea to go back to some of this grounding before moving on, unless you feel very comfortable with this stage already.

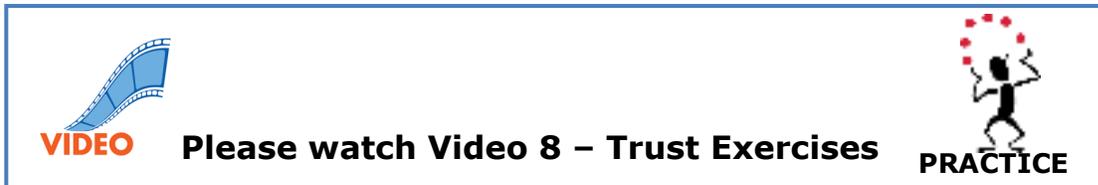
In either case, watching the demonstrations with your learning goals in mind will help you to observe what happens that might be helpful to you, or to see ways in which you might have done something differently than what happened in the demonstration.

Make any notes below of what you've seen that you'd like to explore more fully in the next example.

Notes from Demonstrations of Building Trust:

8. Trust Exercises

Before we get into practicing Building Trust, we would like to introduce a number of exercises that you can do alone or with others to deepen your own self-awareness as well as to build trust in coaching relationships. Here in Module 8, we introduce our colleague, Pat Pinto, who plays the role of the learner Leader Coach. He is working with Susan on exercises to use in Building Trust.



Focus on Strengths

In these first exercises, Susan asks Pat to introduce himself in an unusual way: without reference to titles or roles. We often use these 'shorthand' ways of talking about ourselves rather than focusing a deeper level of response.

When you have finished watching the first segment, pause the video and answer for yourself the questions Pat has just answered in the conversation.

I am at my best when...

I am best able to help others when...

I am most competent at...

You may have noticed in the video that Susan asks what other strengths Pat is aware of. What other strengths do you have that you did not refer to in your answers to the questions?

Other Strengths:

It is often very difficult for us to talk about what we are good at – we have been schooled to be modest, not to brag about ourselves, and sometimes that inhibits us from acknowledging our strengths. We encourage you to share this exercise with someone you know, answer the questions for each other, and then give each other some feedback on how you felt about the climate of trust that was created both in the introduction of the exercise when the coach created the appreciative connection, and in the responses as the coach listened and clarified and showed empathy.

What did you learn as you shared your strengths with your learning partner?

My Learnings from Sharing Strengths:

Potential Areas for Change

The next section of the video shifts to a focus on potential areas for change or improvement. You will notice that Susan asks Pat to take just one minute in silence to reflect on what his potential gaps might be. Please pause the video again and take one minute to reflect on your own potential learning needs, your overall developmental goals as you've been thinking about them so far. You may want to set

your alarm for one minute so you can track the time – you'll notice in the video that Pat starts to speak before the minute is up.

Coaching on Building Trust

In the final section of this video, Susan builds trust with Pat by coaching him through his development need. This coaching isn't intended to solve Pat's issue but simply to get started, working through each of the steps in Stage One: Building Trust as we have seen previously.

As you watch the video, play the role of the observer again, noticing the overall climate created by Susan as the coach, how she moves through the four steps in the Building Trust process, and how she also builds some awareness for Pat and helps him to take one small step toward building a different future. She is coaching through all three stages in the Leader Coach process as she focuses on the steps in Stage 1.

See if you can identify the steps and stages as you watch. What feedback would you give Susan about her coaching on Building Trust? Here are the four steps again to use as a reminder:

1. Create the appreciative connection
2. Understand the goal/issue/story
3. Use active listening, empathy, clarifying questions
4. Reflect on themes, causes.

Remember to use the rules of good feedback, below:

What I liked, what worked well:

What I would have liked more of or less of:

9. Practice in Building Trust

Here in Module 9, Practice in Building Trust, we introduce our colleague, Pat Pinto, who plays the role of the learner Leader Coach. He will coach Carol through the Building Trust stage of the Leader Coach process. After about 5 minutes, they will stop and debrief the coaching using the feedback structure we've already covered.

As you watch the video, play the role of the observer, making some notes on what you like, what you think works well, and what you might like more of or less of from Pat if you were being coached. Remember to notice not only the words but the body language, the tone and mood, the overall presence of the coach that contributes to building a relaxed, trusting environment for the coaching.

When the coaching is complete and Carol and Pat debrief the process, compare your positive and constructive feedback with the observations Pat and Carol discuss. You may also want to go back through the video to see what you might have added that would have improved the coaching.



VIDEO

Please watch Video 9 – Practice in Building Trust



PRACTICE

Notes on Building Trust Practice:

Positive

Constructive

Self-Discovery

So, how did you do? Did you have some of the same comments on the coaching Pat did with Carol? Did you have some unique observations of the coaching they didn't cover? What did you learn from the practice?

It is time to try out Building Trust in your own setting but before you do, take a minute for your own self-discovery. Make note of what you take away from this exercise that you will use as you apply Building Trust in your leadership. What will you do? And what will you not do? What questions will you use? How will you begin?

Notes on application from Building Trust exercise:

Applying Your Insights

This is your opportunity to practice what you have learned about Building Trust. Choose someone who is willing to be coached and to give you some feedback. Let the person know that you are practicing a new style of leadership and would like their comments on your effectiveness. You might want 2 or 3 different people so you get a range of experience and some comparative feedback. You might choose someone at work, someone at home including your children, and a friend or someone in your community.

Begin your conversation by Building Trust. Use the steps in the Leader Coach process as a structure for your questions. Remember, the overall question is: What's So? Think of yourself as an investigative journalist on assignment to get the story. You want to create a climate that encourages open communication. You want to

listen, reflect back what you've heard, and ask questions to help the person to be clear about their current situation and issue. This is not a time for challenge – you are simply discovering all you can about the person's experience so you can contract for additional coaching.

We've included a Coaching Log as Appendix 5 and we invite you to use this log to record your practice as a Leader Coach. It is very important to keep track of what you coached about, what you learned, and what you would do the same or differently next time, especially when you're beginning your Leader Coaching. Carol and Susan both take notes of each coaching conversation, even after years of practice. These records are invaluable as the process unfolds in order to see how much has been accomplished or to return to reinforce key values, decisions and directions.

Make some notes here about your overall experience at Building Trust. Use the feedback structure we've presented to analyze your performance.

What I did that I liked, that worked well:

What I would do more of or less of next time:

Tools, Tips, Techniques

Here we share with you some of the practices we've found most useful in Building Trust as a Leader Coach. As you develop your skill, these techniques and ideas will add to your effectiveness. You may find some of your own as well that you want to make note of so that you can include them in your Leader Coaching.

10. Unconditional Positive Regard (UPR)

This term comes from Carl Rogers³, one of the pioneers of the human potential movement. Unconditional positive regard, or UPR for short, is one of the foundational concepts of Leader Coaching. Our success as Leader Coaches is primarily dependent on the appreciation we feel for the person being coached. This doesn't mean we always agree. It simply means that we hold the other person unconditionally, without judgement or bias or assumptions, as they tell their story. We put ourselves in their shoes and see the world through their eyes. We give them the benefit of the doubt.

To the extent we are able to hold the other person in unconditional positive regard, we will create a safe environment for open conversation and discovery. We will ask open-ended questions to understand their point of view rather than making suggestions or giving advice based on our own views. We will show empathy and concern rather than challenging. And we will build a trusting climate for further discussion.



In the video, we mention 'learning edges'. A learning edge is simply an area where you feel you are not as competent as you would like to be – in other words, you're at the edge of your capability. You can think about an edge in skiing for example, where you move from

³ Carl Rogers, *On Becoming a Person*, Houghton Mifflin, 1961.

being upright to leaning out onto the edges of your skis in order to change direction. The greater the change, the more 'on edge' you will be.

When we talk about development, we mean pushing out your learning edges to try new things, experiment with new behaviour, to continue to grow as a leader. Your development plan is a reflection of your learning edges and what you intend to do to develop them. And don't forget that UPR applies to you as well as to others – be sure your expectations of yourself are reasonable!

Think of someone you have not held in Unconditional Positive Regard. How might you rebuild trust with that person by showing them UPR and having a Building Trust conversation using the steps in the Leader Coach process? This should feel a bit uncomfortable – give it a try anyway!

My plan for rebuilding trust using UPR:

What's Next?

Going Further in Building Trust

There is a lot more you can do if you want to continue to explore Building Trust. Here we offer a few resources you can use.

Books: *The Speed of Trust* by Stephen Covey, available on Amazon
The Trusted Leader: Building the relationships that make government work by Terry Newell and others, available on Amazon

Article: Trustworthy People

Questions to Ask Yourself:

1. Does my behaviour, most of the time, meet the criteria of the behaviours of trustworthy people?
2. Do I feel that, as a Leader Coach, I can admit when I make mistakes?
3. Do I feel I will lose credibility if I acknowledge I don't know everything I think I should?
4. Would observers say I act pretty consistently, regardless of the context?
5. One of the real challenges of being a Leader Coach, embracing this as a way of being, is that it is not a role you assume at certain times, and then put down. Rather it is who you are, how you are, how you show up. How do you show up? How do you know?

What would other people see?

CHAPTER 3 – Building Awareness

What's so?

We always begin a coaching conversation by connecting with the person being coached to build some trust. Building Trust sets the stage for the next phase to happen – Building Awareness. (For more information about the Building Trust phase, refer to Chapter 2 of this manual). We also need to build trust as we begin to dig into this second stage of the coaching model, Building Awareness, as the coach is likely going to need to challenge the coachee, and only with a solid foundation of trust will that challenge offer the possibility of growth and a new perspective, rather than simply provoking defensiveness, argument or rejection. AND there are likely some aspects of Building the Future which will occur in your conversation as you build awareness,...some sense of a commitment, even if that commitment is only to a further conversation, at a specific date and about a specific topic. So...remember that each stage happens in each conversation...there is always some Forwarding of the action, some way of Building the Future, even in a conversation focused on building awareness.

Our objectives

- to define the steps in the Building Awareness phase so that you understand the flow of the coaching process model
- to provide you with examples and opportunities to apply these steps in case studies and typical situations
- to illustrate how Building Awareness can help the coachee to move beyond the impediments to the change she or he wants to make, by working with Resistance, and understanding the importance of various kinds of dialogue

Your Goals and Development Plan

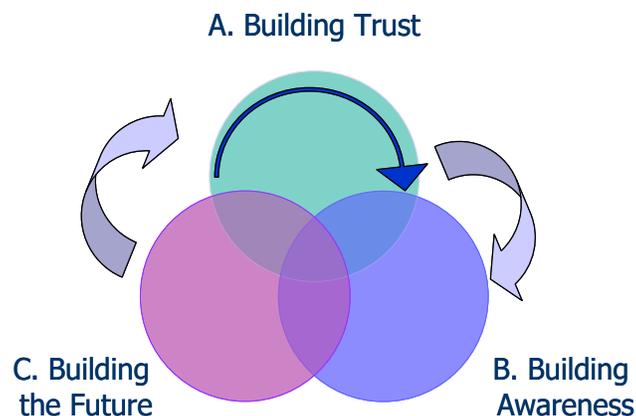
Use the space provided below to state your intended goal for Building Awareness. What do you need to learn or practice in order to be more effective at Building Awareness?

My development goal for Building Awareness is:***So What?***

Building Awareness is the second stage in the Leader Coach process and has to do with building a deeper awareness in the individual being coached so that new possibilities for action emerge. This is the **heart** of the coaching process and requires you, as a Leader Coach, to dig into the coachee's story, provide feedback (with permission) and confront resistance to change. You may feel uncomfortable with this phase in the coaching process as it may require you, too, to dig into your own resistance so that you can courageously engage the coachee in her learning journey. Don't be surprised if your own self discovery accompanies your coachee's! This is one of the wonderful gifts available to the Leader Coach.

The Leader Coach Framework

It is helpful as you work through the phases in the coaching process to have the whole Leader Coach framework in mind. Remember, this is a holographic framework – each of the stages occurs in each of the phases. While here you are focusing on Building Awareness, you will be Building Trust and Building the Future within this phase of the process as well. For example, it is imperative to take the time to create an appreciative connection with the person being coached – a step in Building Trust - before it's possible to take the conversation deeper into the realm of Building Awareness.



The 5 Steps in Building Awareness

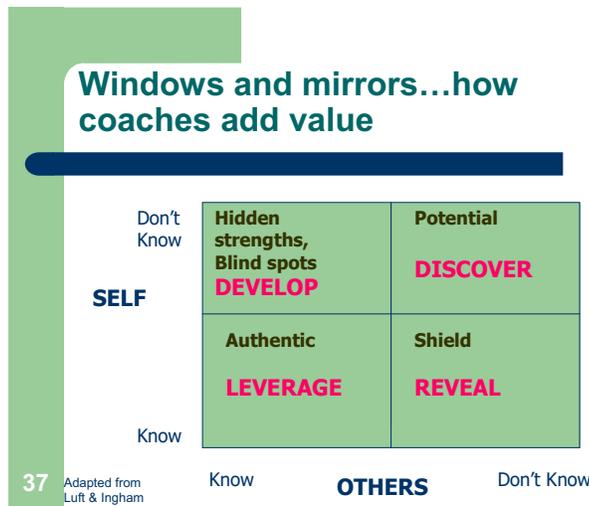
Once again, here are the five steps in the second stage of the model: Building Awareness that we introduced in the previous chapter. You may want to go back to Module 6 (The 12 Steps in the Leader Coach Process) to review these steps so that you're familiar with them as we move into demonstration and practice sessions.

5. Agree on the coachable gap
6. Offer feedback as a learning tool
7. Use dialogue to search, explore, gain insight, understand resistance

- 8. Challenge “discontinuities” - what doesn’t make sense?
- 9. Reframe the issue to create new direction

About Building Awareness

In Module 11, Building Awareness, Susan and Carol talk about this second stage in the coaching process and how it represents the “beginning of the change” – the process of creating **new** information that changes that person **because of** the new information. To illustrate the kinds of information coaches work with, they offer a four box model: **Windows and Mirrors**.



It might be helpful for you to have this model in front of you as you view this video segment...

Things to think about after you have watched this video segment: when you think of your own learning ‘edges’:

AUTHENTIC:

- what do you know about yourself, that you believe others also know about you, and which you can **LEVERAGE** to even greater advantage?
- What about someone you are coaching...what do both you and the coachee know, that can be strengthened with some exploration and awareness?

Here's some space to take some notes as you reflect on these comments:

SHIELD:

- When you think about what you know about yourself that you currently SHIELD from others, what would it take for you to reveal more of that side of yourself?
- What would the advantages be, of doing that?
- And for your coachee...is there a question you can ask that can help that person examine the things she is currently shielding, to determine if there are aspects that might be both safe and appropriate **to reveal**?
-

Here's some space to take some notes as you reflect on these comments:

HIDDEN STRENGTHS, BLIND SPOTS:

- When you think about your "hidden strengths and blind spots"...how might you get the feedback to learn what others see and know about you, that you don't know?
- How can you hear this feedback in such a way as to learn from it, rather than rejecting it, or denying it?
- And for your coachee, how can you provide feedback that will be helpful and generate growth and awareness, to enable her to see herself as others see her,
- How can you help her to realize the impact these aspects may be having on her performance.
- In coaching around this model, it's important to remember that this is about BOTH blind spots (or weaknesses) AND

strengths...some of us are so hard on ourselves we are ready to hear weaknesses but deny our strengths...or not feel that this feedback is as valid. This may be the most challenging aspect of your and your coachee's **development**.

Here's some space to take some notes as you reflect on these comments:

POTENTIAL:

- And the mystery...what is still unrevealed?
- What is there to be **discovered**, in you, in your coachee, that no one yet knows about...
- How might you enter into this area?
- What do you need and want, to feel safe, curious and ready to learn?

Here's some space to take some notes as you reflect on these comments:

And now, here's a chance to integrate all you've just learned. What will you do about all this? What new insights do you want to capture here?



A Demonstration of Building Awareness

If you started at the beginning of this workbook, you'll know that this second stage builds on the foundation of Building Trust in the first stage. You may remember the importance of establishing an "appreciative" connection between coach and coachee, and getting clear on what the 'story' is...what is it that the coachee wants coaching on, and as the coach, what are your hunches of what is going on, in this story.

If you're jumping in at this point, you might want to quickly review the steps in Stage One, Building Trust, and ensure that you know what you would already have done in the coaching conversation, that lays the foundation for this stage of Building Awareness

This next video is a demonstration of Case #1: The Case of Lee Catcher. You must have read this case beforehand... so please turn now to Appendix 1. Before you watch the video, make some notes on your copy of the Case...what would YOU do, as the coach, to help Lee Catcher... A coach needs to be prepared; these conversations are too important to "improvise"....so what's YOUR strategy for how to coach Lee? Take the time now, to make some notes:

My hunch of what's going on?

A question I would ask to help Lee develop self-awareness:

A question I would ask to provide Lee with some feedback:

A strategy I would use to help Lee keep from getting stuck:

Here Pat is coaching Lee (played by Susan) to help her with her development plan. While watching, see if you can identify:

- Where Pat prompts Lee to get clarity of her awareness,

- Where Pat challenges the discontinuities – or holes – in her story,

- Where Pat helps Lee to get to a reframe of her situation.

In the role of observer, pay attention to when and how the steps in Stage 2: Building Awareness take place:

5. Agree on the coachable gap
6. Offer feedback as a learning tool
7. Use dialogue to search, explore, gain insight, understand resistance
8. Challenge “discontinuities” - what doesn’t make sense?
9. Reframe the issue to create new direction



**Please watch Video 13 –
Practice Case # 1**



SEE

NOTE: As you watch the video, you will see that we have sometimes highlighted the step the coach is modeling, in the practice case. You might want to make notes here of where you see the other steps of the model being demonstrated...or were some steps missed?

What **feedback** would you give Pat on his coaching on Building Awareness?

What did you like about how Pat helps Lee build self-awareness?

What words or phrases did you notice Pat use?

What didn't work so well?

What about body language? Tone of voice? Eye contact?

What about pacing? How fast or slow was Pat speaking? How was Lee speaking? Did it work?

Questions to Ponder:

When you think about coaching someone like Lee, what do you know of **your OWN coaching style**, which might be different from Pat's, which will help you have a great conversation?

What do you consider one of your strengths, that will help in a case like this?

What do you know might be a liability in how you coach, that might hinder in a case like this?

How different would your coaching strategy be, NOW, now that you've seen Pat coach this case?

What are your own development edges that you want to explore as you imagine yourself coaching a Lee?

Practice in Building Awareness**A NOTE ABOUT COACHING PRACTICE:**

If you want to develop your coaching skills, you ABSOLUTELY need to practice. You can't learn this by reading about it! SO, you will need, now to set up a coaching "TRIAD"...that is, you will need to find two other people that you can work with, to practice. If you can find two other people who are ALSO developing their coaching skills that is ideal, but not essential.

SO, who will you ask to work with you on this coaching Practice? Remember, in inviting them, you are asking them to HELP YOU develop your coaching skills to be a better leader. The purpose of the TRIAD is to have one person to act as the coachee, and one person to act as the observer. If the other two are also practicing their coaching skills, you can ROTATE the roles of coach, coachee and observer.

FEEDBACK:

Remember the Feedback model we have used: asking the coachee first, then the coach, then the observer, for their feedback and suggestions. And in all three feedback givers, start with the word "I"...to ensure you OWN the feedback. As well, start with what you liked, what worked well. THEN point out what you believe didn't work as well for you, and why?

Make sure all three of you read the case....and remind the person who is playing the coachee, that for you to develop your coaching skills, the coachee needs to be coachable...!!

If you can only practice as a pair, rather than a triad... in the feedback process, make sure you "wear two sets of glasses" so you can give feedback from an observer perspective.

Set a timer so you can really concentrate on the coaching, rather than worrying about time, but only coach for about 7 minutes (and don't worry if you don't complete the case!)
..and there nothing to stop you from doing this case again...remember that this is about skill building... and in fact, as you coach through these practice sessions, remember that you can stop at any time, and replay a sentence, or in fact the whole conversation....this is about learning, not about Task Completion.

Why a case rather than a real example? As teachers we have found that using a 'real' example too early, learners get focused on the content, the issue in question, rather than the coaching process.

So first, you might want to use this space to take notes of what you hear as feedback from the three "players" in this scenario:

What did the coachee like?

What did the coachee want differently?

What did the coach like?

What did the coach wish had gone differently?

What did the observer like? What would the observer have like to see go differently?

You as an observer:

What did you see that you liked? What worked? Why, do you think?

What surprised you? What did YOU think was not as effective a way to coach?

What would YOU have done differently?

Use the space below to capture your key observations and learnings from this practice case:

Some things to consider:

- How did you present both “backbone and heart” in having this conversation with Lee: how did you hold Lee in Unconditional Positive Regard (even, perhaps, while you are aware of your own frustration or annoyance)?
- How did you show empathy and patience as Lee described the current situation and reaction to the feedback?
- How did you ensure you did not “enable” Lee, but continued to hold her to account, to confront the discontinuities?

- How were you able to keep up the pressure and maintain a focus for the conversation despite any 'detours' Lee might have wanted to take?

Dealing with Resistance

Resistance is at the very heart of coaching. If I know that I want to make a change and there is nothing stopping me – i.e. there is no resistance - then I will make the change. When change becomes difficult – or seemingly impossible – resistance is at play. The gift of coaching is helping another person to deal with their own resistance so that they can make the change they want. It's absolutely critical that coaches become comfortable with and skilled at coaching resistance.

Resistance has many causes or triggers

- For many adults we want to be in control and we often exhibit resistance when we fear or experience the **loss of control** – over our environment, our future, our work situation or family situation. A loss of control can trigger immense resistance.
- Many people just **don't like change** and any change in and of itself will be enough to trigger resistance - even when it's a change they want to make.
- For other people it's not the change itself but how it has been brought about. Perhaps they are suddenly tossed into a situation which has taken them by surprise and the **uncertainty of the context** is what's causing them their resistance. They would have been okay with more notice or more preparatory time.
- Others fear they will **lose face or lose faith**. Perhaps they are concerned that the change they want to make is one where they will feel less competent or they will be judged to be less competent by people that matter to them. And so that may create a kind of resistance in them.

- Another kind of resistance is triggered because the current situation is **a reminder of a previous situation** that went badly. “I don’t want to go there again, the last time I went there it went badly.”
- Another factor might be that the idea itself – **the change – is perceived as wrong**. This is demonstrated in the practice case of Sandy Mortola (see video #13.) When being coached to take on a perspective regarding the kind of leader role that she or he needs to exhibit in the future, Sandy just doesn’t agree with it. She or he doesn’t think that people skills are important. The choice of names in the cases is meant to be neutral so that either gender can play the role.

There are a number of things that can trigger resistance. There may be more than we’ve listed here and you may want to think about it and jot down your thoughts below.

What have you experienced that created resistance for you? What did that feel like?

TIP: One of the best things a coach can do in understanding resistance is to get some coaching about something that you yourself have resistance on. It’s really helpful to remember what it’s like to walk in another person’s shoes around something that you have resistance about.

Recognizing Resistance

We’ve talked about all kinds of reasons why people might resist. Now, what do you do about it?

1. Recognize resistance when it occurs

The first thing is to **recognize it**. What does resistance look like? The most obvious displays of resistance are what we call open, direct attacks. For example, direct challenges - the coachee says “I don’t think so” or “I don’t agree with that” or “Where did you get that information?” – there’s pushback, they’re being aggressive and you can see it - you’re really aware right away that this is somebody who is resisting. That’s actually easier to deal with than covert or hidden resistance.

Hidden resistance can show up in various ways. It could be someone requesting additional information or stalling in terms of making a decision or making a commitment. They say they need more information or time, which can sometimes be true, but it could be a manifestation of resistance. Or someone could be slow to respond to your requests, they may be dragging their feet in terms of delivering on their commitments. They might not completely miss the deadline but they deliver incomplete work or they deliver it a little bit late.

Sometimes silence can be an indication of resistance. However, this is one aspect of resistance to be careful about: silence could *also* be an indicator that the person needs some processing time, perhaps they're rehearsing what they want to say, or they're testing how far they can trust you. When you are faced with silence, check the person's body language for clues about whether or not she is resisting. What would the body language look like if they were? Or were not?

Another example of resistance is when a coachee simply doesn't show up for her appointment, or is consistently late, or consistently makes excuses for not meeting commitments– that might be a kind of resistance.

As you can see, there are all kinds of manifestations of resistance. And the thing to do as the coach is realize that resistance is an absolutely natural part of being an adult and especially of being in a coaching relationship. Your challenge as a coach is to see resistance as a **gift**. It is in fact THE gift that will help you to realize how you can deliver the most value to the coachee. Remember, it's a normal part of any change process and your job is to identify what is taking place. You will know whether it's appropriate to even name it as resistance – that will depend on how much trust and awareness the coachee has. And, you need to encourage the resistance to surface so you can work with it. That requires enough trust so that the resistance is in a form that you can deal with.

2. Acknowledge Resistance

Once you have recognized resistance, listen to it and acknowledge it – make sure that the coachee realizes that it's okay, natural and, in fact, a good sign. From that foundation you can explore and work through the resistance to the point where that person can make the change they want to make by finding a creative solution to their problem, issue or challenge.

Two absolute golden rules of coaching resistance

1. Do not take it personally. The resistance is not about you, even if you are the supervisor of this person
2. You must not enable inaction. That is, you must not allow the resistance to stop the coachee from moving forward, from making a commitment and delivering on it.

Recap

Resistance is natural, it's a gift in coaching and you need to get good at coaching it. It's the heart of the matter.

What is your own experience in "living" these two golden rules, as you practice coaching resistance? Note your reactions and learnings here.

A Demonstration of Dealing with Resistance

Let's see dealing with resistance in action. In this video module, we watch our coach, Pat, practice coaching to deal with resistance in the Case of Sandy Mortola (go to Appendix 1 where you will find Case #2. Please make sure you have read through the case, and made notes on your coaching strategy to have a great conversation, before you proceed).

Your notes on your coaching strategy for this case:

Carol plays the role of Sandy and Susan takes on the observer role. While viewing this clip, see if you can identify how Sandy manifests resistance.

 VIDEO	Please watch Video 14 – Practice Case #2 (Round 1)	 SEE
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Write your observations here:

What behaviours tell you that she is resisting?

What happens to the coaching conversation when resistance is present?

How does Pat deal with this?

How does it affect his ability to work through the steps in Building Trust and Building Awareness?

And, note how Carol, Pat and Susan – as coachee, coach and observer - work through the feedback process at the end.

What other thoughts occur to you now, that you want to remember for your own Coaching techniques for dealing with Resistance?

What would YOUR feedback to Pat have been? What did you like?

What would you have done differently?

After receiving feedback, Pat now has a chance to return to his coaching conversation with Sandy and apply what he's just learned so he can take the conversation through the Building Awareness phase and into Building the Future with a commitment to action.



VIDEO Please watch Video 14 – Practice Case #2 (Round 2)



SEE

As you watch the video, look for:

How does Pat show up differently this time?

What happens to Sandy's resistance?

What feedback would you give to Pat about his coaching this time?

Practice in Building Awareness – Dealing with Resistance

So now it's your turn..., first of all, **read the Sandy Mortola case** all the way through... try to get clear about where the coaching challenge is likely to be.

Now, think about your own coaching strengths and areas for development...where, in this case, will your skills be particularly tested?

And now, what is your **coaching strategy** for this case?

What do you hope will be the outcome?

What do you want to say, or do, or not say or not do?

And it's time to involve two other people now, as members of your learning triad. Make sure all three of you read the case, and

understand how to rotate the roles...7 minutes coaching, and 8 minutes of feedback and debrief, each time. Here are some reminders of how the triad works:

FEEDBACK:

Remember the Feedback model we have used: asking the coachee first, then the coach, then the observer, for their feedback and suggestions. And in all three feedback givers, start with the word "I"...to ensure you OWN the feedback. As well, start with what you liked, what worked well. THEN point out what you believe didn't work as well for you, and why?

Make sure all three of you read the case....and remind the person who is playing the coachee, that for you to develop your coaching skills, the coachee needs to be coachable...!!

If you can only practice as a pair, rather than a triad... in the feedback process, make sure you "wear two sets of glasses" so you can give feedback from an observer perspective.

Set a timer so you can really concentrate on the coaching, rather than worrying about time, but only coach for about 7 minutes (and don't worry if you don't complete the case!)

..and there nothing to stop you from doing this case again...remember that this is about skill building... and in fact, as you coach through these practice sessions, remember that you can stop at any time, and replay a sentence, or in fact the whole conversation....this is about learning, not about Task Completion.

Tools, Tips, Techniques

TIP:

As the coach, do you talk too much? **"W.A.I.T."**

Particularly in the Building Awareness stage, it's important that the coachee do most of the talking, and that you, as the coach, limit your contribution, for the most part, to asking a great, open-ended question that truly encourages the coachee to learn and grow and deepen her self-awareness. SO, if you find yourself talking, and particularly if that

talk is to give advice, you might use the acronym "W.A.I.T." helpful....which means

Why Am I Talking?

Some coaches write the letters W.A.I.T. at the top of their page of notes, to remind themselves, that they don't want to be talking very much in this stage of the coaching conversation....and asking yourself WHY you are talking can help to remind you...this is the coachee's time to explore, to experience resistance and work through it... Good luck with W.A.I.T.!

TIP: Using Silence: Count to 10

If you find that you are uncomfortable with silence in a coaching conversation, and yet you know that silence may be a helpful coaching technique with this particular coachee, giving her the time and space she needs to reflect internally and prepare her answer to your question, you might find it helpful simply to COUNT TO 10...(in your head). This will both help you to not speak sooner, than at least 10 seconds, and also help you discover the benefits that sometimes arise in a coaching conversation when the coach simply stops talking. Holding the silence may help the coachee to 'practice inside' what takes real courage to say out loud...or it might be a time for the coachee to reflect and assess the degree of trust and therefore openness in the coaching relationship...there may be many reasons to encourage periods of silence in the coaching conversation.

Powerful Questions

You might say "to coach is to ask questions." The power of a well crafted question cannot be overstated. Any question is almost always better than a statement. Why is that? It is because questions engage the coachee in a dialogue. We have probably all experienced when someone has told us something and we've just sat there silently and not particularly engaged. Whereas, when someone asks you a question you are engaged. You begin to grapple with the question. In fact, it's been said that the change process begins the moment the question is asked. The question begins to create the momentum and some energy for the change.

It's important for you to become really good at asking questions, even when the coachee asks you a question. When this happens, learn to ask a question back, continually encouraging the coachee to take ownership for their problem, to realize that they most likely DO have the answer within them and that you can provide support and

encouragement while they explore their increasing awareness and new realization around their resistance.

Sample Powerful Questions for Building Awareness

5. Agree on the Coachable Gap:

I wonder what you think about... How does that fit for you? A different interpretation of the issue might be... How do you feel about that? How could we think about that as something we could work on? Is this a gap that you are interested in exploring? What is the nature of the gap you are referring to, do you think?

Some questions for you as you develop your coaching skills:

Which questions seem especially powerful to you?

Which questions would be a real stretch for you to ask?

Which questions do you need to practice saying, to find your own voice as you ask them?

6. Offer Feedback as a Learning Tool:

Could I offer you some feedback on that? What I see as a strength is... What I see as a learning edge is... Your body language tells me you are feeling uncomfortable... Is that the case? What can we learn from this? Would you like some time to reflect and we'll meet again tomorrow?

Again, some questions for you:

Is there a question here that you want to remind yourself to use? How will you remember it?

Is there a question here that you need to practice saying?

7. Use Dialogue to Search, Explore, Gain Insight, Understand Resistance:

So, what does all this tell us? What do you think it means? What's your best guess about why that is so? How does this relate to that? How does it all fit together? I hear your reluctance to discuss this... What are the voices in your head saying to you? Can you rephrase the statement using "I" instead of "They"?

Consider how important coaching resistance is....

How can you master these questions?

How can you use your own resistance to help ask great questions to understand resistance?

Make some notes to yourself here about the questions you find most powerful for understanding and coaching resistance:

8. Challenge Discontinuities:

I notice you said “x” today and “y” last week...can you explain? You say you’re not good at strategy and yet I see you leading the team in this area – how do these two views fit for you? I have a hunch we are avoiding the issue of work/life balance – how can you do this within a reasonable work day?

Questions to you as you work through this step:

How can you ask these questions as respectful challenges, while demonstrating Unconditional Positive Regard?

How can you prompt yourself to dig deeper, when your intuition suggests to you that there is something more going on, for the coachee?

9. Reframe Issues to Create New Directions:

What alternatives do you see for achieving that goal? What would a better option than the current one be for you? How could you see that working? Paint me a picture... What if we step back and see the bigger picture – what would that look like?

And finally, some questions for you to consider here:

How can you really be listening carefully, so that you can help the coachee to ‘nail down’ this new perspective?

How can you develop good paraphrasing skills to summarize the reframe?

The Importance of Dialogue and Coaching Language

As we have covered in the previous segment, coaching is all about questions. And it's particularly about asking open-ended questions. It's not simply about you as the coach asking one question after another, it is about creating the conditions for a wonderful conversation or dialogue. Ask yourself: what is it that's going to open up trust between me and the coachee such that she will really begin to explore her areas of resistance?



Please watch Video 15 – Dialogue



DISCOVER

Open-ended questions are questions that are not simply answered by a word: yes, no, maybe. Rather, they engage the coachee's curiosity, sense of discovery, and growing sense of self awareness as she grapples with and explores the kinds of things that are really getting in her way. So the questions that you ask are in service of her growing ability to understand the issue that she wants coaching on.

The questions have to be framed, like every other aspect of your coaching approach, in Unconditional Positive Regard. You want to make sure your question doesn't have a veiled judgement in it and is truly coming from a place of curiosity and discovery. It needs to be supportive in tone. And it **will** be heard as supportive when you are actually manifesting your belief that this person can make the change she wants to make. This will include not only the question itself, but

your body language, eye contact, tone of voice, pacing, degree of empathy that you emanate, and many other 'non-verbal' cues.

You might also find yourself sometimes asking questions and simply letting the coachee sit in silence for a few seconds, or even a minute, while she prepares her answer. This might seem like a long, long time for you! And you might find it a bit difficult. We REALLY encourage you to keep quiet and let the coachee explore that question you have posed in silence. We've noticed that coaches who don't immediately get a response to the first question they ask often ask a second question or a third question and the problem with that is the coachee is then confused about which question she should actually be answering. What you don't want to do is increase the coachee's confusion, you want to help the coachee build understanding.

So, in brief:

- Use UPR,
- use open-ended questions and
- be comfortable with silence.

NOTE: If you find that you are talking too much, and giving too much advice, rather than asking great questions... see "W.A.I.T." above.

Your own reflections:

Use this space here to capture your learnings...what strikes you as most important to remember from all of this?

What strikes you as most challenging for you to use and remember, in your coaching?

What strikes you as most comfortable and natural for you to build on your strengths, as you coach?

Coaching Language

There are no absolute guarantees in terms of what you can say that will ensure that your coachee will make the change she wants to make. However, there are some words to use and some not to use and some ways to structure your conversation and some ways not to structure your conversation that will foster an environment where change can occur.

**VIDEO**

**Please watch Video 15a –
Coaching Language**

**DISCOVER**

Here are some suggestions – and you might have some others that you can think of:

1. Your job as the coach is to ask questions rather than to provide answers. The degree to which you can be staying in the frame of asking questions will make a better coaching conversation
2. Listen for the difference between a statement that starts with “You should...” versus a question that starts with “Could we explore...” Can you hear how in “you should” there’s a kind of telling? That is quite likely to create some resistance or defensiveness. Whereas, in “could we” there is an opening up of possibility, there’s a shared accountability and it’s based in curiosity and exploration. Try to avoid the word “should”, as it shifts the power balance and projects a judgement that you are right and the coachee is wrong, or stupid... it becomes advice-giving and telling, which goes against the principles of good coaching.
3. Another key word to avoid is “but”. It has a kind of dismissive flavour to it: “**But** I don’t see why that’s important...” is a kind of harsh way to respond to someone’s suggestion. You could simply change the “but” to “**AND**” and this will, in a sense, transform the conversation to be more inclusive and one in which you’re acknowledging the truth of both the original statement and the challenge that gets added at the end. Changing “but” to “and” is a good habit to get into in all of your daily conversations!
4. We also encourage you to get more comfortable with feeling questions. In some organizations and some cultures, feeling

questions are really tough and yet we know that the change is only going to happen when the person FEELS differently and experiences an emotional reaction to something. We tend to think that it's in the world of ideas that change happens. Research suggests that this is not true. So seek out the feelings beneath the thoughts that will help that change happen.

Those are some ways to enrich you coaching conversations.

SO, reflecting back on the importance of coaching language, what is a development goal that you would like to declare, here?

What is your commitment to practice this development goal in your coaching? (Create a SMART goal for yourself here...what will you do, with whom, by when?)

Communication Filters

You may find this hard to believe, but research from Harvard University suggests that only 7% of how we communicate is in the words themselves. Think of the other messages that are being communicated in addition to the words – things like body language, eye contact, tone of voice, pace of speaking, the context into which we are speaking, etc. There are a number of very powerful filters affecting our communication beyond our words. As a coach, it's really important to be aware of those things that might be getting in the way, or filtering, the ability for us to have a good conversation.

Some of these might be:

- What is my mental state as a coach?
- What is the mental state of the coachee? How do I know? How can I find out?
- What kinds of assumptions am I making? For example, am I assuming the person understands my meaning?
- Am I checking to see whether the other person has the same understanding as I do?
- Am I making a judgment about them?
- Have I got some belief about this person?
- Do I have a hidden agenda?

My being aware of my own mental state is an important part of getting ready to have a good coaching conversation. We might also encourage the coachee to prepare for the coaching session by asking herself about her mental state. My mental state might be that I am angry about something that happened at home; I might be fearful and distracted about something happening to my personal health; I might be remembering the last conversation I had with this person and the fact that I left it feeling angry and frustrated...these are all mental states that might affect how present I can be, as I engage in this coaching conversation.

For yourself, what are examples of what you might notice in yourself and in you coachee that would tell you about your/her/his mental state?

So, before any coaching conversation here are some questions you might ask yourself are:

what's my emotional state?

Am I feeling open, easy going, relaxed and comfortable?

Or am I feeling insecure or threatened in some way? (This may have nothing to do with the coaching conversation about to take place.)

And what's the emotional state of the coachee?

Is she ready to have a great conversation?

Both of our mental and emotional states can be significant filters to whether or not we're going to have the kind of effective communication we want in our conversation.

And one other factor that could affect our ability to have a good conversation is the current state of the relationship we have. If we've already had some tough conversations where the coachee has made some commitments and not delivered on them, we may find ourselves having a tougher kind of conversation than we would otherwise have. We might find it necessary to rebuild trust where this is the case, going back to the beginning and re-establishing the relationship.

Think of a time when you felt that you communicated particularly well...what did you do? How do you know it was successful?

Think about a time when you felt you communicated particularly poorly....what did you do? How do you know it was not successful.

SO, again, what is your own commitment to your growth as a coach? What is your development goal around communication?

Dealing with filters – a summary:

Let's recap, and after each point, think about a specific development goal or challenge for yourself:

Become Aware –manage your own awareness to be centered. That means learning to park whatever else is going on in your life so you can truly listen carefully and keep your eyes and heart open for what emerges

What do you commit to doing differently?

Make It Explicit - state your intentions in terms of the coaching conversation rather than having a hidden agenda. Validate your assumptions rather than hold them up your sleeve. Slow down to allow the pace of conversation to emerge that is comfortable for the coachee, despite the pressures you are experiencing

Thinking about your own experience...when have you had a positive experience in making your intentions explicit?

Thinking about your own experience, when have you had a NEGATIVE experience in making your intentions explicit?

What do you learn from these comparisons? What do you now commit to doing?

Evoke the Other's Best Self – how can you help that person to really feel supported by you: Be appreciative of the work they've done. Be as authentic as you can be.

Positive Regard - let go of "ego" to focus on another person with Unconditional Positive Regard!

Thinking about your own experience...when have you had a positive experience in letting go of your own ego and evoking the best in the other person?

Thinking about your own experience, when have you had a NEGATIVE experience in letting go of your ego and evoking the best in the other person?

What do you learn from these comparisons? What do you now commit to doing?

A Note on 360° Feedback

If you think about a circle as 360° degrees, it provides a picture for the kind of feedback we're talking about when we talk about 360° Degree Feedback. It means that I'm going to ask myself for feedback – what is my sense of myself around the structured questions. I'm also going to ask the same questions of my boss or direct supervisor as a person who sees me in my work context. I'm going to ask some of my peers – they see me working differently than my boss does or than I do. I'm also going to ask some of my direct reports for feedback. And, depending on my role, I might ask vendors, suppliers or other outsiders. The point of this is to get what we might call "surround sound". How can we get as many different perspectives on my performance in my role and what can I learn about some of my hidden strengths and blind spots, in particular.

360° feedback is an incredibly useful way of helping me to focus my development in those areas where I have the opportunity to really grow.

We have provided in this workbook a questionnaire based on 18 questions reflective of 4 coaching competencies and you could ask those kinds of people we just mentioned here for their feedback to you. Often the 360° feedback is conducted confidentially – that is, you are not aware of how a particular person responded to a particular question. The exception being with your boss. It's important that you know how your boss views you, so that person's feedback is normally identified separately, as is your own. The others are normally averaged so that their confidentiality is protected.

The advantage of 360° feedback is that it gives you a more complete picture than you might get just from yourself or just from your boss. And it allows you to see how the different audiences or publics that you serve, view you. Are they consistent? What kinds of development opportunities are obvious to me from this feedback?

Please keep in mind that feedback, no matter how freely given, does not necessarily change you directly. You might still discover that even though you want to improve and develop, you do experience some resistance, and that's a helpful place to start to get some coaching.

Depending on how you are using this material, you might want to share this questionnaire with some people who see you coaching....it won't be as confidential as we've described here, but it will still give you some ideas of where your strengths and blind spots are, from their perspectives. And that is helpful information as you build your coaching competencies.

If you do ask others for their comments and feedback on your skills, here are some points to remember:

How to receive feedback:

- Regard it as a gift. It's a gift that people have given you in the amount of time it took them to complete the survey and they have cared enough about your growth and development to share their perspective with you. So, see it as a gift and as something that you might need some time to digest and understand. Don't try to take it all in, in one sitting.
- You have a choice about which parts that you work on. You probably don't want to work on everything that you receive feedback on.

- Find something that's already a strength that you can build an even deeper competency in as one of the things to work on in your development plan, rather than the lowest three items. This will give you a sense of traction and competence.

What's Next?

Applications and Getting Feedback

Now it's time to start applying these concepts to the coaching relationships you have, in your life. Consider who you are already coaching, and where you suspect the coachee is ready to move into the more challenging arena of Building Awareness. As you begin to apply these techniques, you might also want to consider, from the start, asking for some feedback from your coachee. So, what is the feedback you would most benefit from? Where are you already aware that there will be challenges for you, as you develop your coaching "muscle"? Where is your OWN resistance showing up?

You might want to reassure the coachee about the safety of giving you feedback, especially if you are in a 'boss-subordinate' relationship with this person. It is a big stretch for some people to trust that their boss actually DOES want to learn and grow, and learn from the feedback of those they lead... so you will likely need to invite feedback several times, and in several different ways...but PERSIST!! It's worth it, it's going to help you enormously to be a better coach and leader.

And once you have asked for feedback, you have the responsibility, as the leader, to actually demonstrate in a VISIBLE way, that you are doing something about it. In other words, the way to get people to feel comfortable about giving you feedback (and the reason they may not) is to act on their feedback in a way that makes it obvious that you have heard them and changed your behaviour accordingly.

Self-Evaluation on Building Awareness

So, just as we've been encouraging you to ask those you are coaching for some feedback, it's also really helpful to pause now, and give YOURSELF some feedback, to build your own awareness of your coaching skills in the Building Awareness phase. Here are some questions to consider, and the space to write some reflections and

answers, as you re-examine the five steps in this phase: Think about one specific coaching relationship as you note your answers here....and you may want to repeat these questions for each coaching relationship you have engaged in.

5. Agree on the Coachable Gap:

In what ways have you been successful in getting the coachee to say "yes" to a coaching conversation?

How have you been able to help the coachee focus on one issue to begin with?

What is your biggest challenge, as you consider the importance of getting permission or agreement to coach?

6. Offer Feedback as a Learning Tool:

What have you found to be the easiest, and the most difficult kinds of feedback to give?

What have you done to make sure you present the feedback with both 'backbone' (that is, you give clear, unambiguous feedback) and heart (that is, you deliver the feedback with compassion and empathy)?

How have you adjusted your own style, to serve the learning style and preferences of the coachee, in giving the feedback?

How have you checked back to ensure that the coachee understands the feedback (even if she doesn't agree with it)?

7. Use Dialogue to Search, Explore, Gain Insight, Understand Resistance:

What have you learned from your own resistance, that can help you coach resistance in others?

How have you maintained dialogue and Unconditional Positive Regard, when the coachee has withdrawn from the conversation, or appeared to stop engaging?

What have you found most challenging, in terms of your own strengths and growth edges, in coaching in this step?

8. Challenge Discontinuities:

What has worked for you, in holding up a mirror to challenge the coachee?

How have you managed your own emotions and potential frustration?

How have you rebuilt trust, if that has been necessary, when you have continued to challenge in the face of the coachee's resistance?

9. Reframe Issues to Create New Directions:

How have you helped the coachee come to a 'new story' about the challenge she is facing?

What has worked? What has not?

In what ways have you encouraged the coachee as she begins to gain momentum to a new way of being?

Where are your own learning edges as you complete the stage of Building Awareness in the coaching conversation?

What do YOU need to develop, and perhaps get coaching on?

Using the competency questionnaire

Use the questionnaire, at least for yourself, to understand what the skills are that you need to master to be a great coach.

Updating Your Development Plan

It's time to revisit your development plan (see template in Appendix 4) and add in your development goals, current situation, the gap and specific steps you will take to increase your ability as a Leader Coach in Building Awareness.

CHAPTER 4 – Building The Future

What's so?

Building the Future is the third stage of the Leader Coach process and, in many regards, the most important because in Building the Future you are coaching to a specific commitment the coachee agrees to. That means the coaching conversation is more than a friendly chat between two learners. It actually has some backbone to it which involves an action plan. It reinforces the importance of the foundations you've laid in Building Trust and Building Awareness - it is here the rubber meets the road. So we encourage you to develop your skills in Building the Future in order to become excellent as a coach facilitating change.

Our objectives

We hope now you have worked through the earlier stages of Building Trust and Building Awareness that, in working through the three steps of Building the Future, you will see their importance in developing a clear and smart commitment. There is an immense opportunity here to add value to your coachee's learning and achievement of goals.

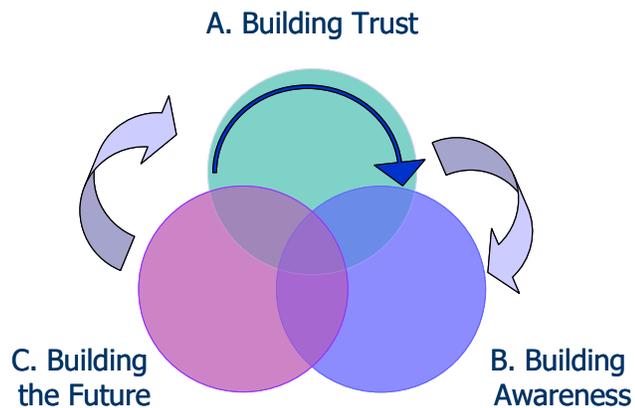
Your Goals and Development Plan

Think about what you most find challenging in coaching people to achieve their goals and objectives. View this as an opportunity to focus on your own learning edge – perhaps by becoming more requiring of change, and to get some feedback from the people you coach about what kind of coaching support you provided and how effective you've been.

My development goal for Building Awareness is:

So What?

The Leader Coach Framework



As you may remember, each of the three stages occurs: that is, in Building Trust, you often facilitate a growing awareness on the part of the coachee, as she tells her story or challenge, of what she is facing, or what she is resisting. And even in Building Trust, you may find that you gain some kind of commitment to a different future – perhaps it’s only that you will meet again and go deeper into the story and start to find a new way of looking at it.

Similarly in Building Awareness, you are likely to go back and reinforce the trust that you have built, particularly as you head into the challenges of the resistance that is preventing the coachee from making the changes she wants to make, and again, making some commitment to a different future.

And so, in Building the Future, as well, you will see echoes and reverberations of the first two stages of the Coaching Process Model, Building Trust and Building Awareness. Let’s dig into this third stage.

The 3 Steps in Building The Future

There are three steps in Building the Future:

10. Develop alternative goals
11. Seek Commitment to action
12. Encourage, support, evaluate, celebrate, start over

We would suggest you watch the video now, even though it may not be completely clear, so that as you read the following notes you will have some background.

 VIDEO	Please watch Video 16 – Building the Future	 DISCOVER
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The first one - #10: Developing alternative goals – is based on the fact that the coachee has a new picture or a new story about the possibility of the kind of change she wants, that became clear as you coached through to a new level of awareness. At this point, and with the new story in mind, you as the coach can become more involved in the conversation and share the air time a little more. This can sometimes be quite fun as you generate possibilities and brainstorm. You need to make sure that you do not simply present one option at this point because it will seem to the coachee as if that is your recommendation or suggestion. Make sure you generate at least three options – together! - from which the coachee may select one as the alternative that she is actually going to commit to.

The “meat” of the whole coaching relationship is really in step #11 – Seeking commitment to action. Here is where the coachee is going to select the one alternative she believes is the best one to achieve the desired change. Using the structure of a SMART goal (*see SMART Goals in Tools, Tips and Techniques*) you help the coachee develop a “what-by-when” commitment.

In coaching in this stage of Building the Future, there might be some leftover resistance on the part of the coachee. This might require that

you go all the way back to rebuilding some trust or building a new level of self awareness as you get to this level of seeking commitment.

The danger – sometimes described as “the monkey on your back” – is that the coach actually solves the problem, even this far down into the coaching process. It’s very important not to be tempted to solve the problem yourself. That is NOT your role. Your role is to help and support your coachee to solve her problem.

As you move into step #12, you can be the encourager, supporter, evaluator or celebrator, and help to recycle or start over with the new learnings. You might well be the accountability partner to whom the coachee reports their progress on their commitment. You might be providing feedback and additional fuel to ensure that the coachee achieves their commitments. It is the coachee, however, who is held accountable for these results.

Before viewing the next video on Building the Future, it’s important to be aware of the importance of choosing the best coaching strategy.

Choosing the Best Coaching Strategy

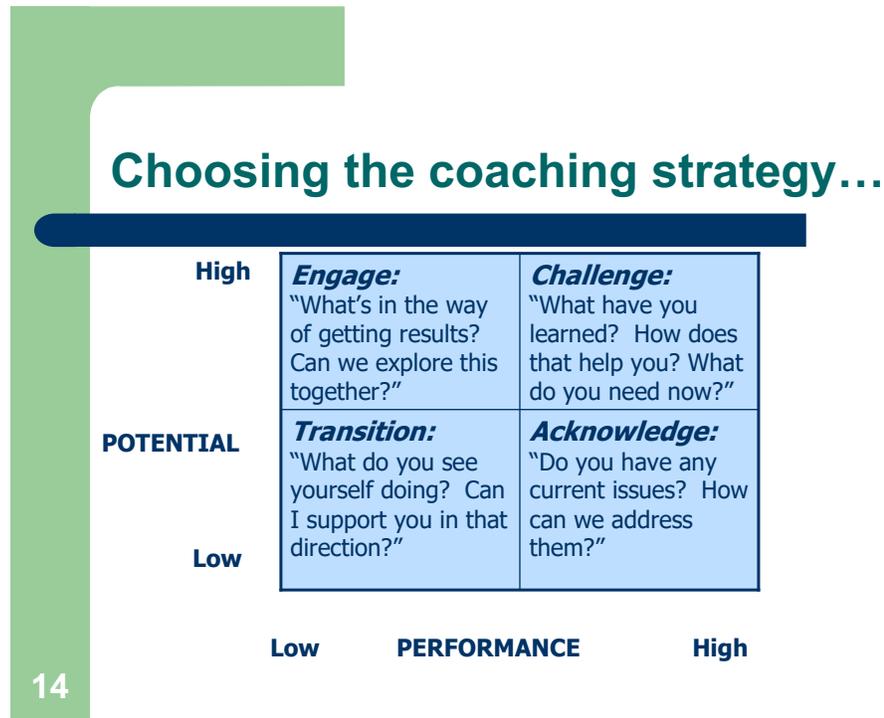
Choosing the best coaching strategy really depends on a couple of key factors. One is the current relationship you already have with this coachee. The second is the level of performance or achievement that this coachee has already attained. With these factors in mind, we’re going to go through four potential scenarios of how you might adapt your coaching strategy depending on the situation at hand.

Remember: This is very situational. It’s very personalized to the immediate situation between the coachee and the coach and, depending on what challenges the coachee is trying to handle.

You may coach in a variety of different situations with a variety of different people, or the same person in a variety of different situations. Whatever the case may be, you need to be able to flex your coaching muscle to adapt and meet the need of your coachee. For example, you might have a very exciting coaching conversation where you’re providing challenge and the coachee is responding to learning opportunities and you both are feeling very confident about the growth that’s occurring. OR, when something in the person’s performance shifts and you are faced with having to provide discipline or perhaps transition the person out of their role, you will need to employ a different kind of coaching strategy. However, even with this dramatic

change, we want to remind you about Unconditional Positive Regard: you can be a great coach all the way through that process.

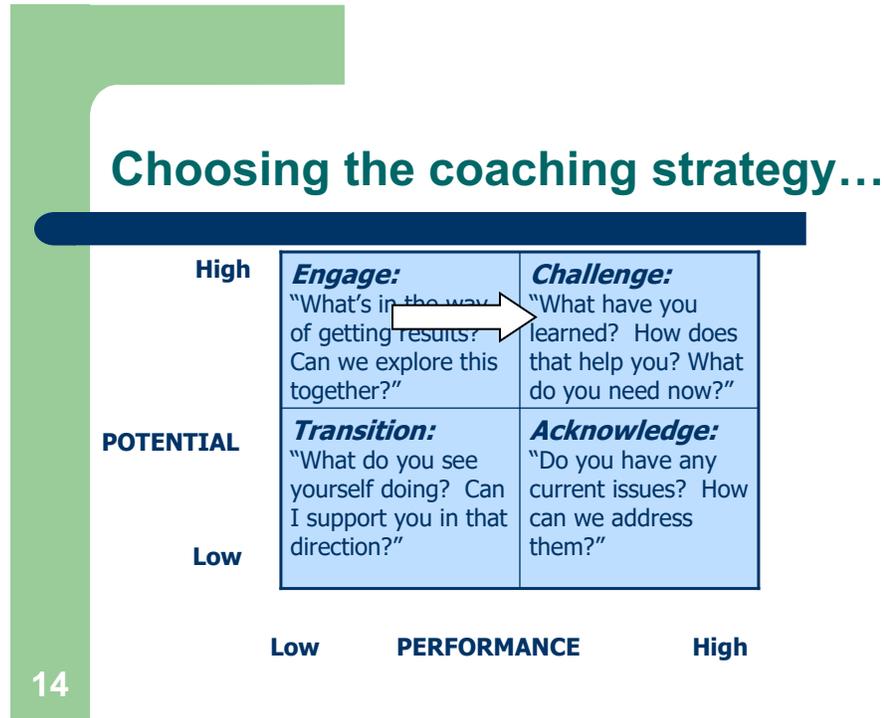
The graphic below is a reference tool you can use to determine what kind of strategy best fits the current circumstance, using a 4-quadrant model with two axes: the coachee’s level of potential, and the coachee’s level of performance.



CHALLENGE:

Let’s take the example where you have someone whose performance is high and you see them as having a high potential to continue to contribute to the organization. The coachee is clearly contributing and meeting his goals. This type of coaching can be a really fun exchange of ideas about what’s possible - what are the alternatives that he might look at. The challenge here for the coach is to stretch the person to continue to learn and develop. Perhaps this person habitually says “yes” when asked to do additional projects resulting in him not meeting his needs for rest, recreation, exercise, time for family, and so on. So, in this kind of example, one kind of coaching strategy you might adopt as you help this high potential/high performer make his commitment to action, is to ensure you ask questions about work/life balance, and about how the coachee himself

can take responsibility for saying “no”, helping him to understand the consequences of sometimes say no.



ENGAGE:

Another kind of coaching situation is where you are coaching somebody who, in the past, has been a strong performer. Something has happened causing his performance to slip and you have confidence that he can recover. A good place to start this particular coaching conversation would be with exploring the reasons for the performance slippage -“What’s happened?” - and together you develop specific improvement plans using the SMART Goal structure. In a situation like this, you normally would provide more direction and more structure than you have been up until this point, to make sure that his performance doesn’t get any poorer. You will be offering your feedback and lots of acknowledgement as the coachee begins to make the changes to turn the performance around. Again, you really want to make sure you do not take on the accountability for the change in performance and you ensure that it is the coachee who is accountable for the action and commitment.

Choosing the coaching strategy...

POTENTIAL	High	Engage: "What's in the way of getting results? Can we explore this together?"	Challenge: "What have you learned? How does that help you? What do you need now?"
	Low	Transition: "What do you see yourself doing? Can I support you in that direction?"	Acknowledge: "Do you have any current issues? How can we address them?"
		Low	High

PERFORMANCE

14

TRANSITION:

A third variation of a coaching strategy happens when you've had the kind of conversation described above with someone and his performance hasn't improved. In fact, you have likely had 3 or 4 such conversations where there is a commitment made and broken over a number of weeks involving different performance slip ups or failure to deliver on a continuing promise. In this situation, you might actually be looking at the need to move the person out of his current accountabilities. The coaching challenge here is to understand what capabilities this person has and determine what other role or situation he could be successful at, all the while maintaining unconditional positive regard (UPR). You might need to work with Human Resources or your direct supervisor to ensure you understand what you can and cannot offer in the way of discipline or a transition. What you really want to do is help this person to find something that he can do where he will actually be successful. What you cannot do, is simply tolerate poor performance. You cannot support a lack of progress. You cannot stay stuck.



14

ACKNOWLEDGE:

The fourth coaching category in this model supports the consistent and solid performers. These people are often overlooked in the organization because they tend not to be “the squeaky wheels,” they aren’t the stars and they aren’t the ones whose performance is really attracting attention. Rather, they quietly and consistently perform well. The coaching challenge here is to find ways to encourage them to continue to contribute at that level while further developing their competencies. One way to do this might be to have them share their expertise with others. Another coaching opportunity in this category is to inquire into issues as they arise before they turn into serious ones affecting performance or engagement. This may require you to provide conflict resolution support.

Choosing the coaching strategy...

POTENTIAL	High	Engage: "What's in the way of getting results? Can we explore this together?"	Challenge: "What have you learned? How does that help you? What do you need now?"
	Low	Transition: "What do you see yourself doing? Can I support you in that direction?"	Acknowledge: "Do you have any current issues? How can we address them?"
		Low	High

PERFORMANCE

14

So, as you reflect on this model, notice that in Engaging, the performance has slipped but we see the person has still have high potential to contribute in the long term to the organization. However, in the transition phase, that potential has eroded to the point where we question their long term viability in their role. And in the final category, the person may not have the interest or capacity to climb the corporate ladder but their performance is solid and consistent.

These are four specifics of how you might adapt your coaching strategy, depending on the performance and the potential of the person you are coaching as you help them commit to a specific action and plan. Use your judgement to choose the coaching strategy that fits **best** with the performance and learning style of the coachee.

About Building the Future

In the following video – Building the Future – Susan and Carol discuss the three steps of this coaching phase, with particular emphasis on Step #11 – seeking commitment to action - and the importance of choosing the most effective coaching strategy. As you watch this video, you might want to be on the lookout for:

- How you understand the importance of a 'new story' that pulls the coachee forward into the future?
- How you see the importance of putting real rigour into the creation of a commitment from the coachee...this is often where the coach can bring tremendous value to the coachee...as stating the commitment out loud seems to add extra 'punch' to the intention.

As you watch this segment, we would encourage you to be thinking of the coaching opportunities you have...

- How might you apply some of the learnings from this video into your own situation?
- Where can you identify a chance to include more rigour in the establishment of SMART goals?



**Please watch Video 16 –
Building the Future**



DISCOVER

As stated earlier, there is a very good chance that while in the Building the Future stage, particularly as you coach your coachee to commit to action, that you will encounter (or re-encounter) resistance. The Acorn Story video serves as a great reminder of what's behind resistance and how to address it. Susan and Carol share their insights.



The Acorn Story and You: Think of a time when you mustered up the courage to step out of something comfortable and familiar. What was the situation?

What vision of “what could be better” pulled you forward?

How can you draw on this experience in your coaching practice?

12. Encourage, support, evaluate, celebrate, start over

Step 12 is in some ways one of the most important steps in the coaching model. Unfortunately, too often, we have heard from employees that the celebration of wins is often excluded. As well, remember that because you've been through the process once on one issue doesn't mean it's over – you can start again on another development goal.

A Demonstration of Building The Future

The Case of Chris Cooper (rounds 1-3)

In this video, Pat coaches Chris Cooper, played by Susan and demonstrates a coaching conversation. In this scenario Chris begins in the Challenge quadrant as a high potential who has been to a course and has created some development plans to broaden his financial background so he can become a general manager.



VIDEO Please watch Video 18 –
Practice Case #3 (Round 1)



SEE

What does Pat do, to communicate to “Chris” the value of solid performance?

What words have particular power in this situation?

What does Chris particularly value and ‘hear’ in this exchange?

It's 3 months later and Pat has asked Chris to check in. Chris' performance has not been as Pat had hoped or anticipated. Round 2 of the Case of Chris Cooper is a demonstration of how to "Engage" when performance has slipped.



VIDEO Please watch Video 19 –
Practice Case #3 (Round 2)



SEE

How does Pat change his coaching style, to reflect this different situation?

What words or phrases have particular power in THIS situation?

What do you sense Chris gets from this exchange, that is different from the first conversation?

Another 3 months have passed and Chris' performance has not changed. In this third round of the Chris Cooper case, Pat demonstrates how to have a compassionate coaching conversation with a valued employee who is not making the grade. This final round can go either way – the most likely scenario is that Chris agrees, with the coach's help, that he is probably a 'high professional' in the Acknowledge quadrant, and is not going to make a general manager. Having come to this realization, he breathes more easily and focuses on growing in this functional role rather than trying without success to become something he is not. Sometimes, if Chris can't break through his desire for a more general role, you as his manager need to make clear the performance criteria for his role and that he must achieve these criteria in order to continue. You don't want to lose Chris because he brings a highly valuable and scarce skill set to the organization.



**Please watch Video 20 –
Practice Case #3 (Round 3)**



SEE

Again, what does Pat do now, to convey the seriousness of the situation and the consequences of Chris's decisions and performance?

What works to help Chris see the 'truth' of this situation?

And now, as you think about coaching this situation, what strikes you as the "bottom line" in coaching at this stage? What have you learned from The Case of Chris Cooper?

What would you have done differently with this case, if you could coach it?

And how would you ensure that you include some of the attributes of Step 12 – closure, celebration, evaluation, recycling – in your coaching?

Practice in Building the Future

Now it's your turn... You have the opportunity to coach Chris Cooper now. So, review the case, and assess in each of the three scenarios, what coaching strategy you are going to adopt. This about the increasing challenge to hold Chris in Unconditional Positive Regard, as your own reaction likely includes an aspect of frustration and disappointment.

Again, it's time to work with your coaching partner or triad...this case works best with all three roles of coach, coachee and observer...and that you rotate the roles so each of you gets to practice and develop your skills, if all three of you are learner coaches. Remember that all three rounds of this case need 7 minutes of coaching and 8 minutes of debrief, and also remember that there is a structured approach to giving each other feedback, which we have included here. And finally, the role of the observer includes the role of timekeeper....the point here is to practice your coaching for 7 minutes, not till you finish the task!

After **round one**:

Debrief after 7 minutes of coaching: rather than waiting until you've done all three rounds of this case, *the learners are encouraged to learn as they go, to continue the conversation and build on the feedback each time.*

From Chris's perspective, what worked?

What helped to shift the energy so that Chris could hear the feedback and the requirement to take accountability?

What would Chris have preferred more or less of, to help move through Building the Future?

What did you as the coach feel worked well?

What do you wish you had done differently?

From the coach's perspective, how were you able to continue to coach, despite the temptation to tell Chris what to do (if that was your temptation)?

What insights can the observer share?

After **round two**:

Debrief after 7 minutes of coaching:

From Chris's perspective, what worked?

What helped to shift the energy so that Chris could hear the feedback and the requirement to take accountability?

What would Chris have preferred more or less of, to help move through Building the Future?

What did you as the coach feel worked well?

What do you wish you had done differently?

From the coach's perspective, how were you able to continue to coach, despite the temptation to tell Chris what to do (if that was your temptation)?

What insights can the observer share?

After **round three**:

Debrief after 7 minutes of coaching:

From Chris's perspective, what worked?

What helped to shift the energy so that Chris could hear the feedback and the requirement to take accountability?

What would Chris have preferred more or less of, to help move through Building the Future?

What did you as the coach feel worked well?

What do you wish you had done differently?

What would have been a better strategy?

How were you able to maintain your composure?

From the coach's perspective, how were you able to continue to coach, despite the temptation to tell Chris what to do (if that was your temptation)?

What insights can the observer share?

Use the space below to capture your key observations and learnings from this practice case.

And finally, what are your Key Observations about how to coach Building the Future, in each of the following steps:

10. reframing to generate alternative options
11. seeking commitment to accountable action plans
12. encourage, support, recycle

More Cases to Develop Your Skill

Following are 8 cases for you to practice flexing your muscle in having coaching conversations in the different performance/potential situations described above. We have provided a possible structure here for you to practice your coaching skills. We would suggest you arrange with your two coaching learning partners (the people you have been working with in your coaching triads) to agree on a time to meet, perhaps over lunch, for about 45 minutes...you will each get time to practice and develop your coaching skills. It would be wise to create a plan to work on **one case a week where the learning partners prepare their strategies for coach and coachee and then come together to practice for 7 minutes and give each other feedback.**

In the introduction to each case we've left a blank to invite you to consider what kind of relationship and what kind of performance level the coachee displays, so you can choose your coaching strategy...we'll provide our sense of the "answers" at the end of this section.

Performance Improvement Cases:

(High Relationship/Low Performance)

Case #1:

Buzz has been reporting to you for the past several years. Previously, he was a personal friend, as well as colleague, and at one time, your confidant. You know his family well and last summer your respective families vacationed together at his cottage. In the past, he was one of your better performers, though in the last 6 months his results have been lower than your expectations, and appear to be on a steady decline. You have been making some significant changes in the organization's operations as part of your overall change strategy to improve performance, and you have noticed that Buzz has neither commented on nor acted on these changes. You have one quarter left to meet your targets and you are experiencing tremendous pressure from the CEO to do so. You fear you may not get a second chance and so must do everything possible to achieve your targets. You have decided to begin performance improvement discussions with the lower performers in your group. Buzz is first on your list.

Use the standard structure of feedback, and make sure all three of you get a chance to coach to this case.

What is your key learning or take-away from this case?

Case #2

Sarah has been a solid performer in your group in the past, and is well liked by her peers, colleagues and customers. Lately, something seems wrong. She has been tense and irritable with everyone, including customers. She has not indicated to you that anything is wrong, and typically she is a very open person. You've known each other for years and have shared a lot of your life challenges with one another. You tried to broach this subject with her recently and she brushed you off, saying everything is fine. Today, you received a complaint from a top customer that she has missed some key deliverables. They are quite upset as the deliverables were needed for one of their pending product launches. You have arranged to sit down with her and have a conversation. She is due to meet you in 5 minutes. How will you proceed?

Use the standard structure of feedback, and make sure all three of you get a chance to coach to this case.

What is your key learning or take-away from this case?

Developmental Cases:

(High Relationship/High Performance)

Case #3:

The quarterly Board of Directors' meeting is scheduled for tomorrow. This morning the CEO passed on a special request from one of the Board Members, that you present the Corporate Branding Plan you have been working on for the last month. The plan is in its early stages of development, and you are not ready to make a formal presentation. You are also under pressure to prepare a closing presentation to the Board on a project you have just wound up. No one else can help you with that one, so you must focus on it. You will need to rely on one of your direct reports to prepare your Branding presentation. Bud Rose is a high potential and strong member of your team. You feel you have a great relationship with him. You also believe this would be a great opportunity to both test him under pressure, and see how effective he can be in crafting presentations. You are aware that he also has some critical deadlines this week, but you believe he is the only one you can rely on for this important task. Bud is coming to your office to meet with you in 5 minutes. How will you proceed?

Use the standard structure of feedback, and make sure all three of you get a chance to coach to this case.

What feedback do you particularly want this time?

What is your biggest challenge in coaching this case?

What is your key learning or take-away from this case?

Case #4:

You are a recently promoted Assistant Deputy Minister of Finance. You were chosen over your four peers, who are now your direct reports. In half an hour the Minister of Finance is about to deliver the budget and you are expected to attend both the Commons presentation and the subsequent press conference, along with your peers and the Deputy Minister. Just as you are preparing to leave your office, you receive a call from the Deputy Minister advising you that there is an issue that has leaked to the press that could cause the Minister some embarrassment in the Press Conference. He has asked you to ensure someone gathers the pertinent facts in order to brief the Minister between the session in the Commons and the Press Conference. Ordinarily, something this important would receive your undivided attention. However, under the circumstances, that is not possible. You have decided to ask one of your direct reports, Sally Lance, who was a close second to you in the competition for your position, to spearhead this. You would like to give her a chance to gain some significant visibility, and hope to see her promoted when the next ADM position becomes available. You know she is under a great deal of pressure at the moment to deliver some other projects for the Deputy Minister. You have asked her to come to your office in 5 minutes. How will you proceed?

Use the standard structure of feedback, and make sure all three of you get a chance to coach to this case.

What is your key learning or take-away from this case?

Performance Improvement Cases:

(Low Relationship/Low Performance)

Case #5:

Bob Bratt has been under-performing since you took over responsibility for this organization. He has also been a thorn in your side. There is nothing specific you can put your finger on; it's more of an attitude problem. He tends to be very abrupt and prickly with you. You have heard rumours that he had expected to be promoted into your position and was quite upset when your name was announced. What's more, you suspect his situation may not have been handled very well. Your boss is not known for his diplomacy and may well have ignored Bob's feeling about this situation. Bob's performance records indicate he was a strong performer in the past, and discussions with your predecessor confirm this. However, his bad behaviour is now spreading beyond you and is beginning to have a demoralizing affect on the rest of the organization. You have asked Bob to come and see you. He will be arriving at your office in 5 minutes. How will you proceed?

Use the standard structure of feedback, and make sure all three of you get a chance to coach to this case.

What is your key learning or take-away from this case?

Case #6:

Betty Harding is a tough nut to crack. She has been a leadership challenge for you since she moved into your organization 3 months ago. Against your better judgment, you took her into your group on your boss's insistence. He said she had a strong track record, lots of potential, and was an up and comer. What she needed now was a good people leader to work under, to both provide her with a role

model and coach her to increase her effectiveness in this area. In your experience she is arrogant, highly egotistical and generally full of herself. She delivers mediocre results at best, and has shown little, if any, interest in either the example you set as a leader of people, or the coaching you have offered her. You have just reviewed the employee satisfaction metrics for your group and see that her area is not only the lowest in your organization, it is below the norm for the company. You have set up a meeting with her and she will arrive in 5 minutes. How will you proceed?

Use the standard structure of feedback, and make sure all three of you get a chance to coach to this case.

What is your key learning or take-away from this case?

Developmental Cases:

(Low Relationship/High Performance)

Case #7:

Stanley Livingstone is an 'elephant hunter'. As a salesman, he likes to bag the big game. He's good at what he does, and he knows it. And he loves his work. He makes significant contributions to the bottom line, and is well liked by his customers, senior management, and the more junior members of the organization. His relationship with you and his peers is another story. He tends to be highly competitive with his peers and rubs most of them the wrong way. As you and he were former peers, he never altered his behaviour toward you, even after you became his boss. Following the most recent Succession Planning session, your boss indicated that Stanley is considered to be first in line to be your successor and that you are expected to work with him on building his peer relationships. That is considered to be his only weakness. He is coming to see you in 5 minutes. How will you proceed?

Use the standard structure of feedback, and make sure all three of you get a chance to coach to this case.

What is your key learning or take-away from this case?

Case #8:

Chris Noetall has reported to you for 6 months now. She was hired 5 years ago into the high potential program out of her MBA school, and has fast-tracked through several levels of management in a short period of time. She is widely regarded as a strong performer and delivers outstanding work. However, she has her own ideas about how things should be done, and has not demonstrated effective team behaviours within your group. She can be crisp with her colleagues, sometimes even having temper tantrums when people disagree with her, and tends to leave a trail of bad feelings. She frequently disagrees strongly with you when you hold meetings with your direct reports to discuss organizational direction and priorities. You believe Chris has the potential to make an important and significant contribution to the organization, but she needs to change her behaviour in these key areas before you could ever consider recommending her for promotion. You have asked her to meet with you and she will arrive in your office in 5 minutes. How will you proceed?

Use the standard structure of feedback, and make sure all three of you get a chance to coach to this case.

What is your key learning or take-away from this case?

Write your observations here about your learnings on all 8 curbside coaching cases:

What works?

What do you find yourself tempted to do, that doesn't work so well?

What particular developmental edge are you going to work on, as you continue to practice coaching?

Cases and performance/relationship coaching strategies:

Type	Case
Performance Improvement: High Relationship/Low Performance	1 & 2
Developmental: High Relationship/High Performance	3 & 4
Performance Improvement: Low Relationship/Low Performance	5 & 6
Performance Improvement: Low Relationship/Low Performance:	7 & 8

Any other thoughts?

Tools, Tips, Techniques**Sample Powerful Questions for Building Awareness****10. Develop Alternative Goals/Futures:**

Let's make these scenarios real – can you describe your perfect day in your new life? Do you feel yourself being pulled toward the future? Is it compelling? Does it draw you forward and inspire you? What are the benefits and consequences of moving in this direction? Of all the scenarios, which are the pieces that appeal to you most? How could you put those together?

Which of these questions do you feel particularly comfortable using?

Which of these questions do you feel will really help your coachee move forward?

What other questions might you propose, to address their particular step in the coaching process?

11. Seek Commitment to Accountable Action Plans:

You're doing a great job! Let's think about your next career move and what you might need to learn next. OR Our experience over the past month or two suggests that there is some barrier to you achieving your goals. Can we discuss that? OR You've missed another deadline. Can you make a commitment to act on your goals and deliver on it?

Which of these questions do you feel particularly comfortable using?

Which of these questions do you feel will really help your coachee move forward?

What other questions might you propose, to address their particular step in the coaching process?

12. Encourage, Support, Evaluate, Celebrate, Recycle:

Your progress is exciting! How are you feeling about it? What more do you need to know to get over this hurdle? In what way do you sense yourself getting closer to your dream? What have you learned about yourself and your approach to change? What are your particular strengths?

Which of these questions do you feel particularly comfortable using?

Which of these questions do you feel will really help your coachee move forward?

What other questions might you propose, to address their particular step in the coaching process?

Which feel like your “best questions” as you begin to develop your own personal coaching style?

Work/Life Balance

A note about integrity: Coaches are frequently challenged to coach their high performers – and others - around the issue of work/life balance. The purpose is to pre-empt the problems that come with stress and burnout on the job. This invites you, as the coach, to role model work/life balance yourself. REMINDER: As leaders and coaches, we need to walk our talk. We need to find the work/life balance in our own situations that can provide a model for the work/life balance in others. This can sometimes be challenging in a corporate culture where 24/7 availability for customers and for senior leaders is required. It is up to you to determine how you can craft a life that works and one in which **you** do not burn out. Look on this as an area where you might get some coaching yourself.

Is work/life balance a challenge for you? If it is, why not examine it here, and think about what one development goal is, that you might commit to around your own work/life balance?

SMART Goals (Specific; Measurable; Attainable; Realistic; Timely)

When you think about coaching to support your coachee in making a commitment, it's helpful to have this structure of SMART Goals and share it with your coachee. The idea is to provide a disciplined structure that the two of you can use to ensure that there is enough specificity around how the goal will actually be realized, by when. Here are some thoughts on what you might look for in each of the five headings:

As you work through this...we've left you the space to work on the work/life balance goal, or another development goal you've identified in this workbook, to use this structure as we describe it.

Specific - A specific goal has a much greater chance of being accomplished than a general goal. To set a specific goal you must answer the six "W" questions:

- *Who: Who is involved?
- *What: What do I want to accomplish?
- *Where: Identify a location.
- *When: Establish a time frame.
- *Which: Identify requirements and constraints.
- *Why: Specific reasons, purpose or benefits of meeting the goal.

EXAMPLE: A general goal would be, "Get in shape." But a specific goal would say, "**Join the health club in my building where my friend goes and work out with her 3 days a week for an hour each time so that I lose 5 pounds over the next 6 months.**"

SO: what is your specific goal:

Measurable - Establish concrete criteria for measuring progress toward the attainment of each goal you set. When you measure your progress, you stay on track, reach your target dates, and experience the exhilaration of achievement that spurs you on to continued effort required to reach your goal. To determine if your goal is measurable, ask questions such as.....How much? How many? How will I know when it is accomplished?

For yourself...how will you measure your progress? How often?

Attainable - When you identify goals that are most important to you, you begin to figure out ways you can make them come true. You develop the attitudes, abilities, skills, and financial capacity to reach them. You begin seeing previously overlooked opportunities to bring yourself closer to the achievement of your goals. You can attain most any goal you set when you plan your steps wisely and establish a time frame that allows you to carry out those steps. Goals that may have seemed far away and out of reach eventually move closer and become attainable, not because your goals shrink, but because you grow and expand to match them. When you list your goals you build your self-image. You see yourself as worthy of these goals, and develop the traits and personality that allow you to possess them.

In your own situation, how can you give yourself the best chance to be successful? When in the day is it easiest for you to work on your goal?

Realistic - To be realistic, a goal must represent an objective toward which you are both *willing* and *able* to work. A goal can be both high and realistic; you are the only one who can decide just how high your goal should be. But be sure that every goal represents substantial progress. A high goal is frequently easier to reach than a low one because a low goal exerts low motivational force. Some of the hardest jobs you ever accomplished actually seem easy simply because they were a labour of love. Your goal is probably realistic if you truly *believe* that it can be accomplished. Additional ways to know if your goal is realistic is to determine if you have accomplished anything similar in the past or ask yourself what conditions would have to exist to accomplish this goal.

How can you make this goal you are setting something you really care about?

Can you imagine yourself being successful, so that picture can pull you forward when you encounter setbacks?

How can you harness your eagerness to achieve this goal here?

Timely - A goal should be grounded within a time frame. With no time frame tied to it there's no sense of urgency. If you want to lose 10 lbs, when do you want to lose it by? "Someday" won't work. But if you anchor it within a timeframe, "by May 1st", then you've set your unconscious mind into motion to begin working on the goal.

Bring both urgency and realism to your time goal... how can you make this goal a stretch? AND...do you believe you can accomplish it?

Note here any concerns you have about time, as well as your strategies to overcome those concerns

SO, to bring it all together, use this checklist to see how you've established a SMART Goal:

* Who: Who is involved?

*What: What do I want to accomplish?

*Where: Identify a location.

- *When: Establish a time frame.
- *Which: Identify requirements and constraints.
- *Why: Specific reasons, purpose or benefits of meeting the goal.

Accountability and Commitment (The Monkey)

A phrase in the coaching community is “make sure you don’t take the monkey on your back.” (This is actually taken from a classic article from 1975 by William Oncken, Jr., and Donald L. Wass in the Harvard Business Review called “Who’s got the monkey?”). This refers to a metaphor that you as the coach and potentially manager or supervisor of the coachee, might get all the way through the coaching process to the stages of building commitment and suddenly find that *you’ve* made the commitment and the coachee has not. That’s when the monkey is on your back!. So a heads-up: as you coach in this stage, ensure you do not enable inaction (i.e. nobody makes a commitment) AND you don’t take the monkey on your back. Perhaps you could get some feedback to check if this is a temptation you give into - in your desire to be supportive do you actually step over the line and make the commitment yourself? If so, this is something for you to build into your own development plan.

Thin about a situation where you ended up with the monkey. Can you jot down a few of the details here, to refresh the picture in your mind?

What would you do differently next time?

Resources for Development Planning

Depending on the learning goal established by the coachee, you may be asked to provide some resources to help that person. Here is a great opportunity not to take the monkey on your back! Instead, encourage the coachee to do some research and find out what is available. However, because of your position and networks, you may know of resources that you can make available to your coachee. That could include books, courses you have taken, or on line learning you are aware of. You might also encourage your coachee to do some research with your HR department or Learning and Development colleagues. In general, the degree to which the development plan is crafted by the coachee, will increase the chances of the coachee committing to and achieving the learning goals.

One great resource which we've found helpful in providing lots of specific ideas and strategies for further development is **FYI For Your Improvement** by Michael Lombardo and Robert Eichinger. It has many suggestions of courses, readings, development actions and other approaches that any coach will find useful.

Another resource you might want to research in advance, and have available in case you need it, is a "clinical resource". Most coaches, at some point, find themselves in a situation where they are not comfortable with their capacity to deal with a therapeutic need in a coachee – a deep hurt, an emotional breakthrough, a blockage from their past, or other situation. To anticipate this situation, and to be able to respond immediately, it is best to have "done your homework in advance" and to have someone you can refer the coachee to, in that moment. As a coach, it important for you to know your own boundary, or where you no longer feel competent or appropriate to coach...and how to support the coachee to get the help and resources he or she needs, at that time.

What's Next?

Applications and Getting Feedback

One of the most appropriate times to use the Building the Future steps – and indeed, the entire coaching model – is through the performance review process where there is specific data that you can examine and a development plan to build on. In addition, you can use the coaching model as a helpful structure in any kind of developmental conversation to ensure there is some specific milestone to be met in relation to the coachee's learning.

We'd suggest that any conversation can have a coaching structure in it and at the end of the conversation you will be aware of something that has now changed, is now different, has happened – a commitment has been made that wouldn't have been made if that conversation hadn't happened. We encourage you to coach whenever you can and to adopt coaching as your way of leading.

Self-Evaluation on The Coaching Model

Bearing in mind all twelve steps and three phases of the coaching model, think through where you believe you will have the most challenge. Develop specific strategies to get better at those phases, as you coach your direct reports, peers and yourself.

Stage and Focus	Steps	My Learning Edge Rating 1 (poor) to 5 (great)
Stage One: Building Trust "What's So?"	<ol style="list-style-type: none"> 1. Create the appreciate connection 2. Understand the issue/goal/story 3. Use active listening, empathy, clarifying questions 4. Reflect on themes, hunches, causes 	
Stage Two: Building Awareness "So What?"	<ol style="list-style-type: none"> 5. Agree on the coachable gap 6. Offer feedback as a learning tool 7. Use dialogue to search, explore, gain insight, understand resistance 8. Challenge discontinuities 9. Reframe issue to create new direction 	
Stage Three: Building the Future "What's Next?"	<ol style="list-style-type: none"> 10. Develop alternative goals/futures 11. Seek commitment to accountable action plans 12. Encourage, support, evaluate, celebrate, recycle 	

Feedback from your coaches

As a coach, your own skill development is critical to your coaching success and we encourage you to develop mechanisms for getting feedback from your coachees as frequently as possible. You might create a disciplined process wherein every three months, for instance, you have a meeting in which you invite feedback specifically on what has worked and what the coachee would like more of, less of, or differently. In addition, ask for feedback on an ongoing basis in every

encounter – “How is it going for you?” You want to make sure that your coaching strategies and approaches are working for the coachee and not simply because they’re in your dominant style and comfort zone.

Getting some great feedback:

Who are you going to ask for feedback from? When are you going to do this?

What specific feedback are you most interested in getting?

How will you structure the conversation to invite that feedback, and to get it in a way that you can really hear it, and learn from it?

What development goal are you going to commit to, based on this feedback?

What support will you put in place, to help you grow and learn what you want to learn, to be a better coach?

When will you be 'reporting back' to the person or people who gave you feedback, with your thanks for their 'investment' in your learning, and to ask them what, if anything, they've noticed since your earlier conversation?

Celebrating and Recycling

We know that coaching works. And we know that most people find the opportunity to be truly listened to, a transforming experience. As we've mentioned, this coaching model is based in a positive and an appreciative philosophy. And it's appropriate to end with a reminder that this role of coach is - as much as anything - about the encourager and supporter role. As adults, we work together to develop new skills and solutions to challenges. It's not easy, which is why it's important that we celebrate and encourage the tiny, baby steps that the coachee achieves or the learning that is gained from something that might have seemed like a failure. The feedback that you can provide, as well as the support and encouragement that you can provide, are essential to having a successful and positive coaching relationship.

And in a positive and successful coaching relationship, as soon as one challenge or problem has been addressed, you'll now have more credibility and muscle memory built between you to recycle and use to go forward with on the next challenge - perhaps at an even deeper level. Coaching becomes the way you lead rather than just a tool or technique to use for specific situations.

We know from research that, unfortunately, many employees don't hear enough encouragement and praise from their supervisor...and that this can be very motivating. So as you reflect on what you've learned from this round of your coaching relationship, who would you like to particularly celebrate and validate - right now - for what they've achieved and how they've developed.

Try to fill in this table:

Who I want to encourage	What they did I want to emphasize	When I'm going to talk with them
1.		
2.		
3.		

So, you've been with us on a long and intense learning journey...thank you for traveling with us! We trust you have learned about coaching, have practiced and developed your coaching skills, and have begun to make a difference in the work lives of those you've coached. We'd also like to invite you to stay in touch with us, if you have questions, stories of success or challenges, or insights you would like to share with us.

Please reach us through our website, thecoachingproject.com – we'd love to hear from you!!

Appendix 1 – Case Studies

Case #1 - Building Awareness

Lee Catcher has been a leader in an organization for 4 years and is a manager reporting to you. Lee's performance results are outstanding. Over time, you have heard rumblings of employee dissatisfaction with Lee's people skills. You looked at the Employee Opinion Survey results for Lee's division, and they show lack of attention by the leader and low concern for employee career development.

You are about to have a development discussion with Lee. Lee has sent you some high level results from the recent Employee Opinion 360° survey. Lee's results indicate strength in Business Acumen, Strategic Agility, Drive for Results, Perseverance, Functional/Technical Skills, and Intellectual Horsepower. Lee's identified development areas are Listening, Patience, Developing Direct Reports, and Building Effective Teams.

Lee's draft development plan focuses on strengths, particularly requesting challenges in areas of organizational strategy. Lee obviously intends to ask you for a recommendation for getting onto senior level teams dealing with recent strategic changes. While you want to promote Lee's learning and growth, you feel it may be premature to be thinking about more senior level participation until the issues of attention to direct reports and building teams are addressed.

You anticipate some resistance to this feedback. Lee does not have a high opinion of so-called "soft issues", and dismisses 360's and other surveys as HR "frou-frou" that is usually stacked against the manager in favour of employees. You would like to give Lee a clear message that dealing effectively with people is just as important as getting results, but you need to maintain a good relationship with Lee as one of your most productive team members.

Pick up the dialogue after you have established some trust and rapport. Try to move from Stage 1 (Building Trust) to Stage 2 (Building Awareness) in the short time you have, and get Lee to understand the message in the 360° results.

Case Directions:

In your triads, take turns coaching Lee through the development discussion. Take 7 minutes for each coaching role play in your triad with **8 minutes** to debrief with your observer after each round. Use your insights in previous rounds to improve your coaching of Lee in subsequent rounds. Observers keep time. In 45 minutes, you should each have an opportunity to play each role.

Case #2 - Dealing with Resistance

Sandy Mortola has been a problem employee for about 6 months. Sandy started out strong as a hot-shot clinician, and for the first 4 or 5 years was a valued member of the team. After being promoted to team leader 2 years ago, Sandy's team got good results, but you suspect that was due to Sandy's pushing them pretty hard. About 6 months ago, Sandy applied to a mid-level management job that was posted internally. Sandy was turned down, and did not receive full feedback on the reasons for the rejection. Since then, Sandy has been moody and spiteful toward peers and staff. Two clients have complained about curt responses to issues that have escalated to Sandy's level. Sandy is late with an annual report that is now 2 weeks overdue.

You had a coaching meeting with Sandy last week and raised the issue of the report, asking if there was anything wrong, and Sandy was visibly resistant to the discussion. While Sandy did not reveal much to you, you suspect it all goes back to the failed bid for a promotion. You looked at the job posting record and it is clear the hiring manager did some checking up, and Sandy's lack of sensitivity and rough people skills were the reasons for choosing someone else for the job. Now Sandy's performance has clearly slipped. You have scheduled another meeting with Sandy to clear up what is going on. Sandy was reluctant to meet because of the heavy workload but you have insisted.

You intend to engage with Sandy in some performance coaching. You anticipate that Sandy's resistance may take the form of denial there is any problem, or at least anything that Sandy could be responsible for. You plan to surface any resistance, and to handle Sandy's emotional volatility with patience and sensitivity.

Case Directions:

In your triads, take turns coaching Sandy through this difficulty. Take 7 minutes for each coaching role play in your triad with 8 minutes to debrief with your observer after each round. In the second and third rounds, continue the conversation from where it ended so that the dialogue flows from beginning to end through the three rounds. Observers keep time. In 45 minutes, you should each have an opportunity to play each role.

Case #3 - Building the Future

Chris Cooper is a high-potential manager in the Tax Department. With an accounting degree from a top university, Chris has made impressive career gains in the last seven years. Chris' technical skills are superb, and Chris has built a team of solid professionals.

The most recent 360° assessment showed **strong** scores from all constituencies on Integrity and Trust, Functional/Technical Skills, Priority Setting, Creativity, Caring about Direct Reports, and Total Work Systems. The **lowest** scores were Comfort Around Higher Management, Strategic Agility, Business Acumen, and Political Savvy.

Round One:

At a recent Leadership Development Program, Chris and the other participants committed to creating an Individual Development Plan in the next 30 days. Chris came to you for some coaching and guidance regarding what to put in the plan.

You and most other people have admiration for Chris' capabilities and feel Chris can be an effective senior leader someday. Meet with Chris to create some energy and commitment to the broader career direction Chris has chosen, and be clear what the next steps are for a development plan to be effective.

Round Two (3 months later):

Chris' Individual Development Plan was aggressive, but well within Chris' reach. To build political skills and increase networking, it called for more exposure to senior management, and broader experience with the business. It suggested serving on one or two company-wide task forces that had senior management's attention. As Chris' boss, you happily signed off on the plan.

However, 3 months later not much is different. Chris continues to be a successful leader in the Tax area, but developmental projects and exposure have not happened. In addition, Chris failed to include a key business head in a recent decision, which has had serious consequences for the business unit's financial exposure. The IDP was targeted for a year, but you feel it is important to check in now (3 months later) to see why there has been no movement in executing the plan.

Meet with Chris to explore what is going on.

Round Three (6 months later):

You had a very interesting coaching meeting 3 months ago. Chris explained that the press of current work prevented any new or different projects, but saw the importance of getting exposed to the broader business and its leadership. Chris seemed enthusiastic about moving up in the organization, maybe even running a business someday. Although you pushed back to be sure the plan was realistic, Chris was ready to move immediately on the developmental opportunities. You were still encouraging at the time but wanted to ensure Chris learned from his political mistake.

Now 3 more months have passed, and Chris still has not taken the steps outlined at the earlier meeting. Chris' political skills have improved somewhat with more integration of business and functional leaders in decision making. However, no other developmental activity has begun. Now you suspect that Chris enjoys being an expert who is admired for demonstrating unique skill. The risk of giving up technical mastery for something new and uncertain may be a factor in not moving beyond where Chris is now.

Meet with Chris and explore ways to build the future from this point.

Case Directions:

In your triads, take turns coaching Chris over the six months. Use each of the scenarios as you move through the three rounds. Remember to choose your coaching strategy for building the future based on Chris' performance and potential. Take 7 minutes for each coaching role play in your triad with 8 minutes to debrief with your observer after each round. Observers keep time. In 45 minutes, you should each have an opportunity to play each role.

Appendix 2 – Development Plan Template

The clearer you can be about your development need, the better your chances of success. As you review and reflect on your notes and feedback from each day and discuss your insights with others, what are the themes, the key learnings that give shape to your development priorities?

Don't skip over the first three questions below – take the time to really understand the need and the goal. It is usually best to limit yourself to a maximum of three areas to work on at once, especially if your development involves behaviour change. Otherwise, you will lack the concentration needed to accomplish your objectives. Having a written development plan significantly increases your odds of success. Here is a simple template you can use to get you started.

Description of Current Performance or Behavior:

(What is happening now that you want to change?)

a)

b)

c)

Description of Desired Performance or Behaviour:

(What would the ideal outcome of your development look like?)

a)

b)

c)

Description of the Gap:

(What is causing the problem? What's missing? What needs to be done?)

a)

b)

c)

Action Steps and Timelines:

(What will you do, by when, to close the gap?)

a)

b)

c)

Description of Required Resources:

(What resources will you use? Who will give you feedback on your progress?)

a)

b)

c)

Appendix 3 – Coaching Competency Questionnaire

For each statement, give yourself a rating on your current level of competency using the rating scale below: (Indicate with an x, or highlight the one rating that feels most appropriate for you....Please remember to save your document with your last name in the document name, to email back to me!))

- 5 - Outstanding: you are masterful, one of the very best!
- 4 - Excellent: you are talented, this is a strength for you.
- 3 - Good: you are skilled at this, your competence is OK.
- 2 - Average: this is not a strength, you might want to focus some development energy here
- 1 - Poor: this is not a strength for you at all; you may need to seriously look at this competency and how to develop it further.

Section I: Core Competencies

1	2	3	4	5
Poor	Average	Good	Excellent	Outstanding

Honesty & Integrity: acts consistently within a set of core values, honest and direct, maintains confidences, genuine.

1	2	3	4	5
---	---	---	---	---

Purpose & Passion: self-confident, inquisitive, inspiring, lives own life with passionate purpose.

1	2	3	4	5
---	---	---	---	---

Creativity & Vision: able to generate new/different ideas, see patterns, connections and themes.

1	2	3	4	5
---	---	---	---	---

Approachability: easy to be with, sensitive to other's feelings, shares personal strengths and shortcomings, empowers others.

1	2	3	4	5
---	---	---	---	---

Section II: Emotional Competencies

1	2	3	4	5
Poor	Average	Good	Excellent	Outstanding

Listening: listens intently and without judgment to understand the world of the client.

1	2	3	4	5
---	---	---	---	---

Empathy: accurately reflects the experiences and feelings of clients so they feel understood, and uses both verbal and nonverbal messages to explore client situations more fully.

1	2	3	4	5
---	---	---	---	---

Patience: takes time to understand before reacting, tolerates different styles and approaches.

1	2	3	4	5
---	---	---	---	---

Humour: maintains a positive sense of humour and uses it appropriately in client relationships.

1	2	3	4	5
---	---	---	---	---

Composure: faces difficult or stressful situations without defensiveness or frustration, works through resistance, demonstrates maturity and constancy.

1	2	3	4	5
---	---	---	---	---

Assertiveness: processes confrontation and conflict fairly and directly, probes to build client self-awareness and learning.

1	2	3	4	5
---	---	---	---	---



Section III: Cognitive Competencies

1	2	3	4	5
Poor	Average	Good	Excellent	Outstanding

Intellectual Capacity: able to digest new information, ideas, concepts quickly and comfortably, applies critical thinking, relates to client as an intellectual equal.

1 2 3 4 5

Adaptability: copes with ambiguous or changing circumstances, maintains balance when faced with contradictory situations, sees possibilities despite uncertain or incomplete information, an agile learner.

1 2 3 4 5

Strategic Perspective: takes a broad view of issues and projects their future positive and negative aspects, creates workable future scenarios and strategies.

1 2 3 4 5

Business Insight: understands how businesses function, how they relate to their markets and stakeholders, how they are organized, how people perform in roles.

1 2 3 4 5

Section IV: Practical Competencies 

1 2 3 4 5
 Poor Average Good Excellent Outstanding

Process Planning: develops joint goal-oriented planning steps and associated processes, sets agreed upon timelines, deliverables and measures of success.

1 2 3 4 5

Priority Setting: concentrates on critical issues, uses time effectively, maintains focus in complexity.

1 2 3 4 5

Problem Solving: analyzes, tests and explores multiple dimensions of problems and possible solutions, provides useful information and resources for problem resolution.

1 2 3 4 5

Political Smarts: aware of and sensitive to the politics of corporate life and able to suggest appropriate courses of action within the political realities.

1 2 3 4 5



Appendix 4 – Leader Coach Competency Survey



THE COACHING PROJECT®
Leaders Coaching Leaders®

Thank you for taking the Leader Coach Competency Survey. What follows is some background on the competencies assessed in the survey and an explanation of your scores.

Leader Coach competencies fall into two categories: Personal Effectiveness Competencies and Functional/Technical Competencies. The survey you are taking focuses on the Personal Effectiveness Competencies as shown below. These competencies are required in all kinds of Leader Coaching. The Functional/Technical Competencies are the knowledge and experience areas that are particular to the type of Leader Coaching you are involved in or intending to pursue. For example, a Leader Coach of sales representatives on the sales cycle, record keeping, and so on.

Personal Effectiveness Competencies

Core	Emotional	Cognitive	Practical
<ul style="list-style-type: none"> • Honesty & Integrity • Purpose & Passion • Creativity & Vision • Approachability 	<ul style="list-style-type: none"> • Listening • Empathy • Patience • Humor • Composure • Assertiveness 	<ul style="list-style-type: none"> • Intellectual Capacity • Adaptability • Strategic Perspective • Business Insight 	<ul style="list-style-type: none"> • Process Planning • Priority Setting • Problem Solving • Political Smarts
The four central competencies for all coaches.	The “feeling” competencies associated with the individual’s desires, fears,	The “thinking” competencies for making sense of an individual’s situations	The “doing” competencies needed to support implementation of an individual’s

	hopes		learning plans
--	-------	--	----------------

Using the definitions below, add the ratings you gave yourself on your survey using the scale of 1 to 5 on these coaching competencies and then compare your results to our proficiency levels. Remember, these are the ratings you used:

- 1 **Poor** - this needs immediate and serious attention
- 2 **Unsatisfactory** – either untested or unskilled in this competency
- 3 **Satisfactory** – average level of skill
- 4 **Above Average** – better than most at this competency
- 5 **Masterful** – one of the very best at this competency

Description of coaching competency **Rating**

Core Competencies:

Honesty & integrity – acts consistently within a set of core values, honest and direct, maintains confidences, genuine.

Purpose & passion – self-confident, inquisitive, inspiring, lives own life with passionate purpose.

Creativity & vision – able to generate new/different ideas, see patterns, connections and themes.

Approachability – easy to be with, sensitive to other’s feelings, shares personal strengths and shortcomings, empowers others.

Description of coaching competency **Rating**

Emotional Competencies:

Listening – listens intently and without judgment to understand the world of the client.

Empathy – accurately reflects the experiences and feelings of clients so that they feel understood, and uses both verbal and nonverbal messages to explore client situations more fully.

Patience – takes time to understand before reacting, tolerates different styles and approaches.

Humor – maintains a positive sense of humour and uses it appropriately in client relationships.

Composure – faces difficult or stressful situations without defensiveness or frustration, works through resistance, demonstrates

maturity and constancy.

Assertiveness – processes confrontation and conflict fairly and directly, probes to build client self-awareness and learning.

Description of coaching competency	Rating
---	---------------

Cognitive Competencies:

Intellectual capacity – able to digest new information, ideas, concepts quickly and comfortably, applies critical thinking, relates to clients as an intellectual equal.

Adaptability – copes with ambiguous or changing circumstances, maintains balance when faced with contradictory situations, sees possibilities, despite uncertain or incomplete information, an agile learner.

Strategic Perspective – takes a broad view of issues and projects their future positive and negative aspects, creates workable future scenarios and strategies.

Business Insight – understands how businesses function, how they relate to their markets and stakeholders, how they are organized, how people perform in roles.

Description of coaching competency	Rating
---	---------------

Practical Competencies:

Process Planning – develops joint goal-oriented planning steps and associated processes, sets agreed-upon timelines, deliverables and measures of success.

Priority Setting – concentrates on critical issues, uses time effectively, maintains focus in complexity.

Problem Solving – analyzes, tests and explores multiple dimensions of problems and possible solutions, provides useful information and resources for problem resolution.

Political Smarts – aware of and sensitive to the politics of corporate life and able to suggest appropriate courses of action within the political realities.

Total Score

Now Analyze Your Results

A score of less than 55: You have some of the skills required for Leader Coaching but you need development to raise your overall competency level. First, look at your scores on the Core Competencies. If you do not have a rating of 4 on each of the core competencies, start with these first. Without high levels of the core competencies, it is doubtful that you can be successful. Ask others to rate you on these skills and compare their results to your own. Get more information on what you do well and not so well. Create a detailed plan with objectives and timelines to improve in the areas needing attention. Then move to your lower rated skills on the Cognitive Competencies. These are some of the most difficult to develop so get started on any that require improvement. Finally, look at your scores on the Emotional and Practical Competencies and build action steps and deadlines into your plan. These are easier to develop but still require discipline, lots of practice and the more feedback the better.

A score between 55 and 75: You are well on your way to becoming a skilful Leader Coach. Use the process outlined above to examine your lower rated scores and create a development plan for improvement. Remember, too, that your strengths can often compensate for weaknesses. For example, being a great listener can help overcome a weakness in problem solving. When you focus on active listening and help clarify thinking, clients will often solve the problem themselves.

A score over 75: You are a masterful coach! You have the set of competencies required to be effective in Leader Coach roles. Do you have any scores that you would like to see higher? If so, build a development plan as outlined above. Can you check out your perceptions by asking colleagues to rate you on the competencies? Research says that we are the poorest evaluators of our own competency level so you may want to check with those who know you well to see if they agree with your own assessment. In any case, your development will be a refinement of your existing competencies to keep them relevant and fresh.

Thanks again for your participation!

Appendix 5 – Coaching Log

COACHING LOG

DATE	COACHEE	COACHING SUBJECT	KEY QUESTIONS	OUTCOMES	REFLECTIONS

